DOCUMENT RESUME

ED 361 561 CE 064 551

AUTHOR	Cockrum, Jim
TITLE	Retail Merchandising. A One-Semester Cluster Course for Marketing Education. Curriculum Guide.
INSTITUTION	Texas Univ., Austin. Extension Instruction and Materials Center.
SPONS AGENCY	Texas Education Agency, Austin.
PUB DATE	92
NOTE	139p.; For related documents, see CE 064 548-552.
AVAILABLE FROM	Extension Instruction and Materials Center, University of Texas, P.O. Box 7218, Austin, TX 78713-7218 (stock number DE 222 C).
PUB TYPE	Guides - Classroom Use - Teaching Guides (For Teacher) (052)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Classroom Techniques; Competence; Course Content; Course Descriptions; Disabilities; *Educational Planning; Educational Resources; Exceptional Persons; High Schools; Mainstreaming; *Marketing; *Merchandising; *Retailing; Special Education; State Curriculum Guides; Teaching Methods; Units of Study
IDENTIFIERS	*Texas

ABSTRACT

This curriculum guide was developed to help teachers use the new textbook adopted by Texas in 1991-92 for teaching the one-semester Retail Merchandising course. The guide is organized in four sections. The first section contains information on using the guide: an overview, sample lesson plans and other worksheets, suggestions for adapting instruction for special needs students, and information on the Texas teacher appraisal system. Section 2 contains the following materials for developing a scope and sequence: a description of the text and supporting materials, correlations of specific essential elements of the curriculum to the text, assignments correlated to essential elements, resource materials, overview of a recommended scope and sequence, and worksheets for planning a scope and sequence. The third section contains instructional planning sheets based on chapters, with elements, comments, chapter goals, and subheads. The fourth section contains individual planning sheets for each essential element and its subelements. Specific chapters and objectives are cited for each subelement. Planning sheets include comments on chapters, indicators of chapter content, suggested related materials, content, and assignments. (KC)

****
*   Reproductions supplied by EDRS are the best that can be made   *
*   from the original document.   *
****

TX92CD04

ED 361 561

RETAIL MERCHANDISING

CURRICULUM GUIDE

CE064551

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☑ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

- Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

BEST COPY AVAILABLE

Curriculum Guide for Retail Merchandising

A One-Semester Cluster Course for Marketing Education

By

Jim Cockrum

Published by

The University of Texas at Austin
Educational Resources
Extension Instruction and Materials Center
Division of Continuing Education

Developed under a contract with

Vocational Education Department
Texas Education Agency
Austin, Texas

1992

© 1992 by The University of Texas at Austin
All rights reserved. Published 1992
Printed in the United States of America

Brand names, company names, trademarks, or other identifying symbols appearing in the illustrations and/or text are used to clarify and identify and do not constitute a recommendation or endorsement by the author or the publisher.

Curriculum Specialist for Marketing Education / Jim Cockrum
Production Coordinator / Barbara Sutherland
Editor / Ann Gallaway
Cover Art / Elinor Gamache
Publishing Technician / Kathryn N. Roberts
Director, Educational Resources / Barbara E. Selke-Kern, Ph.D.

Additional copies may be ordered from:

THE UNIVERSITY OF TEXAS AT AUSTIN
Educational Resources
Extension Instruction and Materials Center
P.O. Box 7218
Austin, TX 78713-7218
512-471-7716 or 1-800-252-3461 (within Texas)
FAX 572-471-7853

Stock Number DE 222 C

Contents

Acknowledgments iv

Section One: Using the *Curriculum Guide for Retail Merchandising* 1

How to Use the Curriculum Guide • Blank worksheets for planning lessons, documenting TAAS requirements, and recording instruction on and mastery of essential elements • Adapting Instruction for Special Needs Students • The Texas Teacher Appraisal System

Section Two: Materials for Developing a Scope and Sequence 41

Description of textbook and its support materials • Chapters in the text, correlated to specific essential elements • Correlation chart listing elements and citing specific chapters for each element • Scope and sequence recommendations, as a brief overview and in a more detailed version with space for dates and notes • Worksheets for teacher's overview and detailed scope and sequence

Section Three: Instructional Planner Sheets 61

Individual planner sheets for chapters, with elements, chapter goals, subheads, and comments • One sheet for each chapter, front side only

Section Four: Essential Element Sheets for Retail Merchandising 173

Individual sheets for each essential element and its subelements • Specific chapters and objectives cited for each subelement

Acknowledgments

Educational Resources of the Extension Instruction and Materials Center gratefully acknowledges the following persons who served on its 1991-1992 Project Advisory Committee for this and other Marketing Education publications.

- B.J. Caffey, Comanche High School
- Jana Darling, Vocational Teacher Education, Southwest Texas State University
- Betty Helton, McCallum High School, Austin
- Adell Morton, Allen High School
- Al Mozisek, Winston Churchill High School, San Antonio
- Dr. Marcella Norwood, College of Education, University of Houston
- Larry Russell, Clear Lake High School, Houston

Credit is also due to other members of the Marketing Education Curriculum Advisory Task Force. Initial planning for this and other materials began with the August meeting of the MECATF group. For 1991-92 they include all the Project Advisory Committee members plus these ME teachers: Fran Gore, Brenham High School; Nelda Shipp, Mineola High School; Sheryl Lynn Nelson, Tuloso-Midway High School, Corpus Christi; Chris Huffman, Brady High School; Kris Gossom, Wichita Falls High School; and Sandra Telles, Coronado High School, El Paso.

The Center also recognizes with sincere appreciation Berry Sullivan, State Director of Marketing Education, and Emmett Eary of the Texas Education Agency, Austin, for their guidance and support of this project.

Section One

Using the *Curriculum Guide for Retail Merchandising*

- How to Use the Curriculum Guide
- Blank Worksheets
  - Lesson Plan Worksheet
  - Lesson Planning Sheet I
  - Lesson Planning Sheet II
  - Information Lesson Plan Worksheet
  - Affective Development Outlne
  - Lesson Plan for a Task/Procedure/Psychomotor Skill
  - Activity Related to the Texas Assessment of Academic Skills
  - Essential Elements Record/Retail Merchandising
- Adapting Instruction for Special Needs Students
- The Texas Teacher Appraisal System

How to Use the *Curriculum Guide for Retail Merchandising*

This guide will help teachers decide how best to use the new textbook (*Retail Merchandising, 10th Edition*) adopted by Texas in 1991–92 for teaching the one-semester, half-credit course titled Retail Merchandising. The most useful features from the earlier curriculum guide are included here, but changes have been made to accord with the new text. Four factors influenced the changes.

(1) With two exceptions, teachers no longer need to be concerned about addressing the common essential elements for Marketing Education. The only common elements now considered tentatively relevant for the Retail Merchandising course are those on leadership and on safety, and they may be covered in other courses.

(2) The state-adopted textbook addresses all the essential elements now specified for Retail Merchandising.

(3) Support materials from the publisher of *Retail Merchandising, 10th Edition,* help address instructional requirements such as those for developing higher level thinking skills and academic skills. The text and its related materials should be sufficient for presenting the course. The only other materials identified in the guide are several from EIMC-Educational Resources, which teachers may already have and be accustomed to using.

(4) The manual will be the most directly useful basis for planning lessons. For each unit, the teacher's manual has outcomes, unit outline, content to be stressed, discussion starters, reviews of chapters, the top twenty terms, answer keys, and other aids to instruction. Thirty-two transparency masters are provided, correlated to specific units and chapters. Tests and microExam diskettes for computers are listed in the South-Western catalog. (*Note:* Each chapter also has outcomes, which differ from unit outcomes. This guide uses only chapter outcomes.)

Developing a Scope, Sequence, and Schedule

Section Two includes a recommended scope and sequence. Teachers may want to use it as it is, modify it, or replace it. To simplify all three alternatives, the following materials are provided.

- A description of the text and a list of all the chapters in the text are provided first. The list cites the specific essential elements that each chapter addresses.
- A correlation chart shows which chapters relate to specific essential elements for the course. Quite often, *Retail Merchandising, 10th Edition,* contains several chapters that address the same element in different ways.
- A short overview of a recommended scope and sequence identifies the elements addressed by each chapter, and shows that all of them are covered by the chapters recommended.
- A one-page blank form provides work space for the teacher to use in developing a revised scope and sequence.
- The recommended scope and sequence is provided next on several pages of worksheets that can be used as a schedule for instruction. On each page the left column provides space for dates of instruction. The center column shows text chapters in the recommended scope and sequence. The right column is blank for the teacher's notes and activities on each week's chapter(s).
- A set of blank, three-column worksheets is provided for teachers who wish to develop a different scope and sequence. It provides more space than the overview, for additional notes.

Developing and Presenting Instruction

The materials in Sections Three and Four will assist teachers in making other instructional decisions. These sections approach analysis from opposite directions. **Section Three** is arranged for the teacher who plans to present entire chapters in a selected sequence but keep track of when and how each essential element is covered. **Section Four** is arranged so a teacher who decides to teach an entire element at once can see which chapters contain materials that need to be covered. However, any analysis or synthesis should involve looking at both sections, to anticipate problems or strengthen instruction.

Section Three has a set of instructional planner sheets, one for each chapter in the text. Each provides a brief overview of content compared to elements. Each should be helpful for initial planning as well as for quick review during the course of the year. The sheets may be copied, perhaps in color, so they can then be rearranged in the desired order and used as front sheets for lesson plans.

Section Four has sets of pages to help analyze how each essential element will be covered using the textbook and other sources. Each set identifies the chapters in the state-adopted textbook that address the element. Only the specific objectives related to the element are given for each chapter, so the teacher can analyze how content unfolds when the text is covered sequentially. In *Retail Merchandising*, elements are often touched on in several different chapters, but in varying detail and for different purposes. The more indirect and repetitive occurrences are not cited.

Addressing the Cognitive, Affective, and Psychomotor Domains

Marketing teachers teach information, attitudes, and physical skills. For specific essential elements, teachers need to consider objectives that address cognitive, affective, and psychomotor learning. This approach will offer opportunities for extending the boundaries of usual teaching methods, because both cognitive and affective objectives often require going beyond simple knowledge responses to higher levels of thinking.

Actual tasks and specific jobs often require some mastery in all three domains and could be good starting points for determining the method of instruction. Instruction in each of the three domains has special considerations.

Cognitive. Most lesson plans and lesson plan worksheets are designed for objectives related to the cognitive domain, since the mastery of information is a common objective in marketing education. The strategies used are well known.

Affective. Developing appropriate attitudes often requires not only presentation of information, but also subsequent reinforcement and a final evaluation of progress. The evaluation should be based on selected criteria. Specific ME essential elements often present situations for which affective objectives should be stated and met. This development of attitudes can and may take place over a period of time. Later in this section you will find a form, titled "Affective Development Outline," that can help you plan for and foster such development.

Psychomotor. Development of physical skills is probably the least often encountered ME objective, yet in some situations it is vital. Psychomotor skills development is commonly related to the learning of procedures and tasks. The lesson plan later in this section—often used in teaching tasks, procedures, and psychomotor skills—can be helpful whether or not a high degree of physical skill is needed. Many procedures and tasks involve the mastery of steps and key points, this lesson plan's basic design feature. The form can also be used to correlate the procedure to other instruction, such as covering related information and related TAAS objectives. Although some procedures to be learned require minimal physical skill, it is important to state the criteria for success. For example, a speed-plus-accuracy requirement might be one of the standards for using a cash register.

Additional Instructional Responsibilities

Marketing Education teachers are responsible for adapting instruction for special needs students, assisting students in developing higher level thinking skills, and reinforcing basic academic skills. Teachers are also accountable for their teaching skills and for the results of their instruction. Assistance in these various enterprises is provided in several ways.

- **Academic and thinking skills.** The textbook and its support materials can be useful in addressing higher level thinking skills and reinforcing basic academic skills. *Hillcrest Mall: A Retail Merchandising Project,* by the same authors, is an independent unit of study for students who have a basic understanding of the retailing process, and offers opportunities for reinforcing both thinking and academic skills.

    - **Academic skills.** Blank worksheets with checklists of the objectives of the Texas Assessment of Academic Skills (TAAS) are provided at the end of this chapter. They are simple checklists with space to describe the activity and how it fits with other instruction. Educational Resources' *Balancing the Curriculum for Marketing Education* is a student activity book designed specifically to help reinforce basic skills while teaching the ME essential elements. Although based on earlier elements, the book's activities are directly applicable to the new ME and common essential elements. A teacher's guide is available for it.

    - **Thinking skills.** One of the most significant outcomes for general education, vocational education, and especially Marketing Education is that students should develop thinking skills beyond those of rote memory. Today, most materials stress such skills, and most materials and methods reflect Benjamin Bloom's plan for organizing instruction so that it promotes thinking at all levels (*A Taxonomy of Educational Objectives in the Cognitive Domain*, David McKay Co, Inc., 1956). This structural plan consists of six cognitive levels, the lowest being the least complex and the highest the most complex. The six levels are knowledge, comprehension, application, analysis, synthesis, and evaluation. Each of the levels builds on the one preceding. Thus, students must be led sequentially through them, extending their way of thinking at each step. Figure 1 shows Bloom's Taxonomy. Probably the most "teacher-friendly" activities for developing thinking skills are to be found in Educational Resources' *Higher Level Thinking in Marketing Education.* Developed by teachers, the book both explains each concept and provides specific activities based on Marketing Education content. This simplifies the task of making the reinforcement of such skills a part of cohesive instruction. An activity book and a teacher's guide are available.

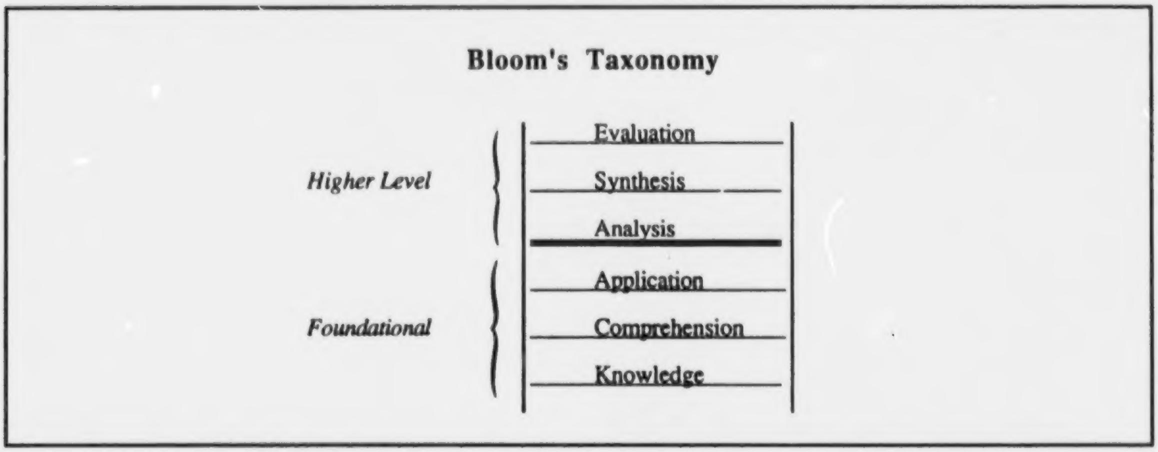


Fig. 1. Foundational thinking skills must be learned before higher level thinking can take place.

- **Instruction for special needs students.** This usually requires additional efforts by the teacher, and these are addressed later in this section.

- **Teaching skills.** The Texas Teacher Appraisal System (TTAS) and its evaluation instrument are used for evaluating teacher skills. The TTAS is covered in a later section, but lesson plans for it are included in this section. Using one of them can help ensure that recommended strategies are used. The textbook as well as its support materials may assist in meeting the requirements of the TTAS.
- **Essential elements coverage.** Teachers are responsible for ensuring that all the elements are covered and that every students masters each one. The end of this chapter has a two-purpose form to aid in meeting those responsibilities.

Lesson Plans and Other Worksheets

There is no standard form for lesson plans, although some schools and districts may have a required form. However, the forms that follow may prove useful in various ways, either directly or by helping tthe teacher design a personal approach. The forms are at the end of this section; they may be copied freely.

(1) **The Lesson Plan Worksheet** combines the basic structure of traditional formats with current terminology and instructional strategies. For that reason it should be helpful in relation to the TTAS. It is designed to be used for one class period. The worksheet has three main sections (see fig. 2). The first section is the heading, which provides space for listing the essential element(s), TAAS objectives, the curriculum document, and lesson outcomes/objectives. The second section provides spaces for recording which of the seven strategies will be used in the lesson: (1) focus activity, (2) explanation/check understanding, (3) guided practice exercise, (4) checking mastery, (5) independent practice, (6) extension, and/or (7) closure. Space is provided to check what will be done with each strategy and to write brief notes about it. The third section provides space for describing a sponge activity that can be used if time is available.

(2) **Lesson Planning Sheet I** is a variation of the first form. Descriptive notations tell how each part of the plan meets specific criteria of the TTAS. Teachers who use this sheet usually have it on a computer so it can be expanded by adding space between the categories.

(3) **Lesson Planning Sheet II** is correlated to the TTAS, but only by codes, such as (6a-n). It also is more useful with a computer.

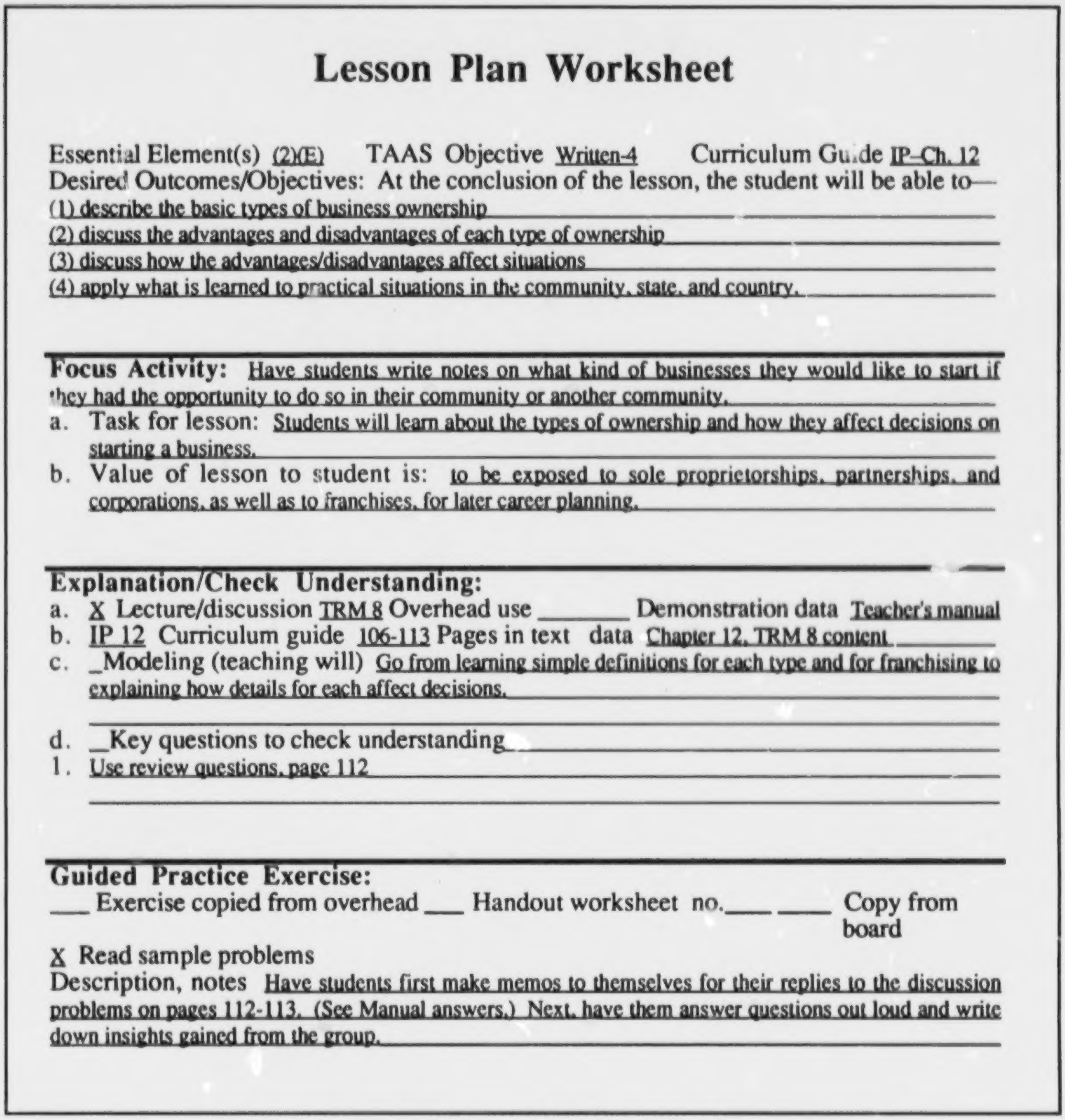
(4) **The Information Lesson Plan** is for teachers who prefer an older form. It is used if cognitive objectives are to be addressed.

(5) **The Affective Development Outline** is designed to help teachers address attitude development. It may not be relevant for this course and is provided primarily for information.

(6) **The Lesson Plan for a Task/Procedure/Psychomotor Skill** is based on the familiar five-step lesson plan. Even if physical skills are not involved, it may be useful for teaching step-by-step procedures, such as selling. It may or may not be relevant for this course and is provided for information.

(7) **The worksheet for TAAS-based activities** provides both a convenient reference and a basic form for describing an activity and noting which TAAS objective it addresses. A teacher can review the information on the sheet, mark the appropriate items, then describe the activity at the bottom of the sheet or elsewhere. The form can help ensure that an activity developed for a particular need can be located and used again.

(8) **The Essential Elements Record** should make it easier to (a) record when relevant instruction is given and (b) record each student's mastery of each element. The heading is blank so the teacher can indicate the purpose the form is to achieve. The space before each element is for recording data the teacher deems important.



Lesson Plan Worksheet

Essential Element(s) (2)(E) TAAS Objective Written-4 Curriculum Guide IP-Ch. 12

Desired Outcomes/Objectives: At the conclusion of the lesson, the student will be able to—

(1) describe the basic types of business ownership

(2) discuss the advantages and disadvantages of each type of ownership

(3) discuss how the advantages/disadvantages affect situations

(4) apply what is learned to practical situations in the community, state, and country.

Focus Activity: Have students write notes on what kind of businesses they would like to start if they had the opportunity to do so in their community or another community.

a. Task for lesson: Students will learn about the types of ownership and how they affect decisions on starting a business.

b. Value of lesson to student is: to be exposed to sole proprietorships, partnerships, and corporations, as well as to franchises, for later career planning.

Explanation/Check Understanding:

a. X Lecture/discussion TRM 8 Overhead use ___ Demonstration data Teacher's manual

b. IP 12 Curriculum guide 106-113 Pages in text data Chapter 12, TRM 8 content

c. _Modeling (teaching will) Go from learning simple definitions for each type and for franchising to explaining how details for each affect decisions.

d. _Key questions to check understanding

1. Use review questions, page 112

Guided Practice Exercise:

___ Exercise copied from overhead ___ Handout worksheet no.___ ___ Copy from board

X Read sample problems

Description, notes Have students first make memos to themselves for their replies to the discussion problems on pages 112-113. (See Manual answers.) Next, have them answer questions out loud and write down insights gained from the group.

Fig. 2. Page 1 of a sample completed Lesson Plan Worksheet

Checking Mastery: (Learning Progress)

X View each student's work ____Have students check and signal correct

Notes: Select questions from "Checking Key Points" at end of unit, or use publisher's achievement test for the unit.

Independent Practice: (reteach those needing help while others work)

___Worksheet No.___ Copy from overhead no.___ ___Copy from board X Copy as dictated

___Reteach worksheet/outline no. ____

Have each student select two of the discussion questions and write a 200-word memo related to each, addressed to someone who would need to know.

Extension: (Enrichment/Application)

___Worksheet No.__ X Other As a mini-project, have students do one of the problem-solving problems and report what they find out.

Describe how this activity makes relevant application of the lesson These problems bridge the gap from theory in the text to reality in the community.

Closure: (Restate the learning) Method used to involve learner in the summary:_______

Restate the types of business ownership, and have students explain the advantages and disadvantages of each. Define a franchise, and have them tell how that information could some day be important to them.

Sponge Activities: sponge focus activity no._____ other sponge activity no.____

See focus activity above.

Materials Required:

Chapter 12 in textbook. Teacher's manual information for the chapter, including transparency to copy and answers. When the unit has been completed, the unit test from the testbook.

Fig. 2. Page 2 of a sample completed Lesson Plan Worksheet

Lesson Plan Worksheet

Essential Element(s)______________ TAAS Objective __________ Curriculum Guide______

Desired Outcomes/Objectives: At the conclusion of the lesson, the student will be able to—

____

____

Focus Activity: ____

____

____

a. Task for lesson: ____

____

b. Value of lesson to student is: ____

____

Explanation/Check Understanding:

a. ___Lecture/discussion ___Overhead use ___Demonstration data____________________

b. ___Curriculum guide ___Pages in text data____________________

c. ___Modeling (teaching will)____________________

____

____

____

d. ___Key questions to check understanding:

1. ____
2. ____
3. ____
4. ____
5. ____

Guided Practice Exercise:

___Copy exercise from overhead __Hand out worksheet no. ____ ___Copy from board

___Read sample problems

Description, notes____

____

Checking Mastery: (Learning Progress)

___View each student's work ___Have students check and signal correct

Notes:

Independent Practice: (reteach those needing help while others work)

___Worksheet no.___ __Copy from overhead no.____ ___Copy from board ___Copy as dictated

___Reteach worksheet/outline no. ____

Extension: (Enrichment/Application)

___Worksheet no.___ ___Other

Describe how this activity makes relevant application of the lesson

Closure: (Restate the learning)

Method used to involve learner in the summary:

Sponge Activities: Sponge focus activity no.____ Other sponge activity no.___

Materials Required:

Lesson Planning Sheet I

SUBJECT:
UNIT:

EE #:
TAAS:
Objective #:

TEACHING, DESIRED OUTCOMES/OBJECTIVES:
The student will be able to:

LEARNING EXPERIENCES:
The student will have the opportunity to:

ANTICIPATORY SET/FOCUS: (2a-communicates learning expectations, 3a-secures students' attention, 4a/6a-begins inst promptly/with appropriate introduction, 6c-relates content to prior/future learning, 8a-relates content to student interest/experience, 9d-establishes rapport)

_____ Focus Attention
_____ Provide Practice
_____ Diagnostic

EXPLANATION/MODELING: (1b-interacts w/students, 2d/8c-reinforces, 6a-begins w/appropriate activity, 6b-appropriate sequence, 6d-definition concepts/description of skills, 6e-elaboration/critical attributes, 6f-stresses generalization/principle/rule, 7b-explains clearly, 7c-stresses important points/dimensions of concept, 7d,e-uses correct grammar/language, 8b, d-emphasizes importance/challenges)

CHECKING FOR UNDERSTANDING: (1c-solicits student participation, 2b-monitors students' performances, 2c-solicits response/demo for assessment, 2d reinforces correct responses, 7e-clarifies student misunderstanding, 9a-avoids sarcasm)

GUIDED PRACTICE: (2c-solicits response/demonstration from specific students for assessment, 3c-clear adminstrative directions, 1f/4b-implements appropriate sequence of activities, 4d-maintains forcus, 9b,d-maintains courtesy/supportive environment)

INDEPENDENT PRACTICE: (2b-monitors students' performance, 4b-implements appropriate sequence of activities, 4e-keeps students engaged, 6q-provides for application, 7e-clarifies student misunderstanding)

CORRECTIVES AND/OR EXTENSIONS: (2e-corrective feedback, 2f-reteaches, 4e-keeps students engaged, 9c-encourages slow/reluctant learners)

CLOSURE: (6h-closes instruction appropriately, 6c-relates content to prior/future learning, 9b-emphasizes value/importance of the activity or content)

MATERIALS USED: (1a-varies activities, 3b-uses procedures/routines, 3d-appropriate seating, 3e-has materials, aids, facilities ready, 4e-keeps students engaged)

MATERIALS NEEDED:

Lesson Planning Sheet II

SUBJECT:
UNIT:

EE #:
TAAS
Objective #:

OUTCOMES/OBJECTIVES:
(6a-h)
The student will be able to:

PURPOSE:

FOCUS:
(2a, 3a, 4a, 6a, 6c, 8a, 9d)

_______Focus Attention
_______Provide Practice
_______Diagnostic

INDEPENDENT PRACTICE:
(2b, 4b, 4e, 6g, 7e) (Mastery = %)

SUPERVISED PRACTICE:
(2c, 3c, 1f/4b, 4d, 9b,d) (Mastery = %)

EXPLANATION:
(1b, 2d/8c, 6a, 6b, 6d, 6e, 6f, 7b, 7c, 7d, 8b,d)

MODELING:

MONITORING:
(Knowledge/Comprehension) (1c, 2b, 2c, 2d, 7e, 9a)

CORRECTIVES AND/OR EXTENSIONS:
(2c, 2f, 4e, 9c)

CLOSURE:
(6h, 6c, 9b)

MATERIALS USED:
(1a, 3b, 3d, 3e, 4e)

MATERIALS NEEDED:

Information Lesson Plan (Current Terminology)

(Used to meet cognitive objectives)

Essential Element ____________________

Subelement ____________________

Unit ____________________

Topic ____________________

Outcomes/Objectives ____________________

Related TAAS Objectives ____________________

Introduction (Focus—do activity; state task for lesson and value of lesson)

Method (Explanation/check understanding, guided practice exercise, others)

Learning Activity (Various strategies, activities)

Resources (Resources include lesson planner #, text, others)

Evaluation (Checking mastery)

Summary (Closure)

Affective Development Outline

Essential Element ____

Subelement ____

Directions: This form provides a way to plan instruction for one essential element/subelement that involves the affective domain. For example, (2)(G) in (a) "common elements" is "Recognize the dignity in work." Attitudes like that are often developed over a period of time by (1) presenting information, (2) reinforcing its importance later, (3) providing students situations and time to practice and develop, and (4) using selected criteria to judge whether a change in attitude has taken place.

(1) Title and location of lesson plan(s) that will include information related to this element and subelement

____

____

____

____

____

(2) Anticipated opportunities for reinforcing importance of this element and subelement

____

____

____

____

____

(3) Ways in which students can practice or perform element/subelement

____

____

____

____

____

____

(4) Criteria for deciding and observing when student has mastered element/subelement

____

____

____

____

____

____

____

Lesson Plan for a Task/Procedure/Psychomotor Skill

Element ______________________________

Subelement ______________________________

Related information lesson ______________________________

Related TAAS objective ______________________________

Procedure or task name ______________________________

Purpose of procedure or task ______________________________

Criteria (standards) for success ______________________________

____

Materials ______________________________

Teaching aids ______________________________

References ______________________________

____

I. Preparation (Focus—state purpose of procedure, its value, and how learning is to take place)

____

____

____

____

II. Presentation (Explanation/check understanding, modeling, demonstration, others)

Steps in the task or procedure	*Key points about each step that can make a difference between success and failure*

Steps in the task or procedure	*Key points about each step that can make a difference between success and failure*

III. Application, practice by students under close supervision
(Guided practice exercise, independent practice)

IV. Test performance of procedure or task to acceptable standards (Checking mastery)

V. Summary of what was learned and its significance (Closure)

Activity Related to Texas Assessment of Academic Skills

for ____

English Language Arts

Reading Comprehension

______ 1. determine the meaning of words
______ 2. identify supporting ideas
______ 3. summarize written notes
______ 4. perceive relationships and recognize outcomes
______ 5. analyze information to make inferences/generalizations
______ 6. recognize points of view, propaganda, and/or fact and nonfact

Written Communication

______ 1. respond appropriately to the purpose/audience in a written composition
______ 2. organize ideas in a written composition
______ 3. demonstrate control of the English language in a written composition
______ 4. generate a written composition which develops and supports a central idea
______ 5. recognize appropriate sentence construction
______ 6. recognize appropriate word usage
______ 7. recognize within the context of a written passage (a) the correct spelling of words, (b) correct capitalization, (c) appropriate punctuation

Mathematics

Domain: Concepts

Demonstrate an understanding of:

______ 1. the concepts of numbers
______ 2. mathematical relations, functions, and other algebraic concepts
______ 3. geometric properties and relationships
______ 4. measurement concepts using metric and customary units
______ 5. probability and statistics

Domain: Operations

Demonstrate skills, concepts, applications for:

______ 1. addition
______ 2. subtraction
______ 3. multiplication
______ 4. division

Domain: Problem Solving

______ 1. estimate solutions
______ 2. analyze problems and identify solution strategies
______ 3. express problems using mathematics representations
______ 4. evaluate the reasonableness of problem solutions

Essential Elements Record/Retail Merchandising

Space is provided before each item for information on instruction and/or mastery.

(1) Retailing. The student shall be provided opportunities to:
____________ (A) understand the meaning of retailing and merchandising;
____________ (B) understand the various types and kinds of retail establishments;
____________ (C) explore the retailing careers available; and
____________ (D) explore trends in retailing.

(2) Economics and marketing. The student shall be provided opportunities to:
____________ (A) recognize the role of the consumer in retailing;
____________ (B) determine the kinds of consumer information needed by retailers;
____________ (C) understand the concept and need of a business producing a profit;
____________ (D) examine the role of retail merchndising in a free or private enterprise system;
____________ (E) describe the characteristics of different kinds of business ownership; and
____________ (F) recognize how market research is used by retailers.

(3) Merchandising. The student shall be provided opportunities to:
____________ (A) determine the importance of accuracy and efficiency in receiving, checking, and marking merchandise;
____________ (B) understand the importance of stockkeeping, handling, and caring for stock;
____________ (C) recognize the need for general safety practices;
____________ (D) learn ways to prevent shortage, damage, and theft of merchandise;
____________ (E) explain stock turnover;
____________ (F) explain inventory control systems;
____________ (G) understand the basic calculations related to retailing; and
____________ (H) examine the elements and use of a merchandise plan.

(4) Selling. The student shall be provided opportunities to:
____________ (A) distinguish between convenience, shopping, and specialty goods;
____________ (B) recognize the need for knowledge of product or service being sold;
____________ (C) distinguish between personal and nonpersonal selling;
____________ (D) identify the steps of personal selling;
____________ (E) recognize the importance of understanding consumer behavior; and
____________ (F) explore selling careers.

(5) Promotion. The student shall be provided opportunities to:
____________ (A) understand that advertising, display, and personal selling are the principal forms of promotion;
____________ (B) recognize the commonly used media for retail advertising:
____________ (C) understand the basic elements of newspaper advertising;
____________ (D) understand promotional mix; and
____________ (E) understand the principles of display.

(6) Store operation. The student shall be provided opportunities to:
____________ (A) understand the need for store security;
____________ (B) explain the importance of store policies;
____________ (C) understand why retailers offer credit; and
____________ (D) identify areas of retail merchandising where computer technology is used.

Common Essential Elements for Marketing Education (not required)

(1) Leadership concepts and skills. The student shall be provided opportunities to:

____________ (A) demonstrate skills, characteristics, and responsibilities of leaders and effective group memebers;
____________ (B) demonstrate a knowledge of parliamentary procedure principles;
____________ (C) plan and conduct leadership activities; and
____________ (D) prepare for effective citizenship and for participation in our democratic society.

(4) Safety and safe working conditions. The student shall be provided opportunities to:

____________ (A) identify and apply safe working practices to all training situations

Adapting Instruction for Special Needs Students

The primary purpose of this unit is to provide the vocational teacher with strategies and techniques that will be useful when teaching students with special needs. It is important to remember that the methods and approaches used with non-special needs students may not be very effective with students who have special needs. Therefore, **individualizing** instruction is vitally important in the successful instruction of special learners.

LEARNING STYLES

Each special learner has unique needs, and these needs affect how the student can best learn. For example, if a student is blind or has difficulty with "visual" learning, the instructor should stress the learner's senses of hearing and touch. If the student is deaf, the instructor should involve the learner's sense of sight. Therefore, the manner in which a student with special needs learns ceases to be a preference and becomes instead a **necessity**. Further, one of the main philosophies behind individual learning styles is that learning should be a pleasant and successful experience. Teachers, therefore, should adjust their style of teaching to allow students the benefit of learning in their preferred manner.

The following are methods a teacher can use to identify a student's learning style:

1. **Informal observation.** A simple and possibly the best way to identify a student's learning style is through informal observation. By observing the student as he or she negotiates classroom/laboratory learning activities, the teacher can collect valuable information about the student's learning style. For example, the teacher may observe that a disadvantaged student answers questions in class and does well with hands-on activities but repeatedly fails written exams. If the primary intent of the instruction is to teach vocational skills rather than reading and writing skills, the teacher could modify his or her teaching style by allowing the student to take oral and/or hands-on exams.
2. **Teacher consultation.** Consulting other teachers (e.g., special education teachers, resource room teachers, support personnel, paraprofessionals, and other vocational education teachers) can be an excellent source of information about a student's learning style.
3. **Student/parent interviews.** Interviewing the student and student's parents/guardians can result in valuable insights as to the student's best learning modes.
4. **Standardized inventories.** Standardized inventories provide an alternative for students who are shy or uncomfortable during a personal interview. Valuable information can be gained from inventories of a student's interests, personality, and learning style.

INSTRUCTIONAL STRATEGIES

Once the student's vocational goals, learning capability, and preferred learning style have been identified, the teacher can begin to experiment with a **variety** of techniques and materials. When determining which ones are best suited to the student's needs, it is important that the teacher be patient, open-minded, and flexible. Not every instructional technique and/or material can be used

---

Note: Adapted from the *Vocational Special Needs Teacher Training Curriculum*, developed at Texas A&M University and available from the Extension Instruction and Materials Center, The University of Texas at Austin. See that publication for additional information.

successfully with each learner. In addition, the teacher should not hesitate to enlist the support of other instructors, school counselors, student aides, paraprofessionals, community volunteers, itinerant teachers, and/or interpreters. Pooling efforts increases the variety of approaches and the level of personal attention, and this improves the student's chances of learning.

GENERAL GUIDELINES AND INSTRUCTIONAL STRATEGIES

The following are general guidelines and instructional techniques which a teacher can use to help meet a special needs learner's unique needs and learning style:

1. **Orientation.** Students with special needs may need additional orientation with regard to: (a) the relevancy of their individualized goals, (b) class procedures, (c) safety, etc.
2. **Flexible pacing.** Students with special needs exhibit different rates of learning. The teacher should be flexible in pacing instruction and assignments to meet the learners' needs. In general, students with special needs should be paced individually to maintain their progress and interest and avoid the frustrations and failure undue pressure may cause.
3. **Demonstration.** The demonstration method can be very effective in introducing a new skill to a learner with special needs.
4. **Breaking material into small, distinct steps.** As a general rule, it is important for the teacher to break a learning concept into small, distinct steps. In this way, he or she can best identify where the student's difficulty lies.
5. **Positive environment and feedback.** In general, students with special needs lack confidence and a positive self-concept. The few successes special learners do enjoy usually result in little, if any, positive reinforcement (e.g., praise, reward, and/or encouragement). Therefore, it is incumbent upon teachers to create a positive, nonthreatening learning environment for their students and to make generous use of positive feedback when the student experiences success. Constructive criticism **should not** be avoided; however, it should be given in a positive manner (e.g., students should understand that their behavior or product is what is being criticized and **not** their worth as a human being). All students must learn that mistakes and constructive criticism are a normal and expected part of life.
6. **Use of peer tutors, college students, and volunteers.** Use of peer tutors, college students, and volunteers can greatly assist a vocational teacher's work with special learners by (a) helping with individualized instruction, (b) providing positive role models, (c) increasing student participation, (d) increasing the special learner's successful experiences, (e) increasing the student's confidence and self-esteem, and (f) improving the special learner's social and academic skills. In return, such assistants gain teaching experience and the satisfaction of seeing the students improve.
7. **Flexible grouping.** The teacher can integrate special needs learners into groups of various sizes (according to the student's goals, interests, or ability level), using assistants to help. Grouping students has the following advantages: (a) it allows the teacher more time to work among the students, (b) it allows the teacher to individualize instruction, (c) it provides special needs learners with an opportunity to work with peers and establish positive relationships with them, (d) it helps motivate special needs learners because the individualized nature of the group work is not threatening or frustrating but allows them to work at their own pace using their strongest learning style, (e) it allows teachers to arrange for instruction for the entire class, small group discussions, project groups, and small remedial sessions so that instruction will be diversified and more meaningful for all students; and (f) it allows the teacher to modify the task or assignment for a small group of students with specific needs, as in the case of learners who have a physical disability.
8. **Providing field trips and job site visits.** Scheduled field trips and job site visits can give all learners a firsthand look into the real world of work. By "shadowing" workers in a particular occupation, students can gain insight into their own career decisions. In

addition, a field trip or job site visit can be very motivational in that the student can readily observe how his/her vocational training will be used in the world of work.

9. **Use of media.** Utilizing media can embellish instruction by (a) assisting the teacher in presenting the proficiency or skill requirements for a specific job, (b) reinforcing concepts presented in a classroom, laboratory, or demonstration activity, (c) providing a way for special needs learners to show what they have learned, (d) providing a valuable source of remedial assistance, (e) providing simulated learning experiences, (g) allowing special needs students to learn through their strongest style, and (h) adding variety to the instructional program. Examples of media include computer-assisted instruction (CAI), 16mm films, filmstrips, flip charts, overhead transparencies, tape recorders, records, posters, magazines, and diagrams.
10. **Use of student-teacher contracts.** Student-teacher contracts can be excellent tools in helping learners with special needs achieve their vocational goals. Use the following guidelines to develop and implement a student-teacher contract: (a) decide on the task or project, (b) specifically state the requirements, (c) determine the minimum acceptable level of accuracy, (d) set a time limit—initially, short assignments and short time periods are usually best, (e) identify consequences, (f) discuss the contract with student and support personnel, (g) have all parties sign the contract, (h) give positive reinforcement if the terms of the contract are satisfactorily met, (i) analyze uncompleted contracts with the student to determine the causes, and (j) develop new contracts cooperatively.

SPECIFIC GUIDELINES AND INSTRUCTIONAL STRATEGIES

The following are lists of specific strategies that teachers can use to address the unique needs of special students. It is very important to note that many of these strategies should be used with all students.

Instructing Students Who Are Mentally Impaired

- Involve as many different senses as possible in the learning process.
- Use concrete, specific terms instead of abstract terms. If necessary, have the student repeat the necessary information to you.
- When giving written directions, use lists instead of paragraphs. To help the student who can barely read, contact the remedial reading staff and arrange instruction. This instruction should focus on required reading for your course and that which is vital for employment.
- Teach by demonstration whenever possible. Don't hesitate to use hand-over-hand assistance when demonstrating how to use a tool or machine.
- Allow time to practice machine and tool processes.
- Break down complex operations into smaller tasks.
- Provide feedback, letting the learner know what is wanted, and whether or not he or she is achieving it. Give lots of positive reinforcement and encouragement. Nonverbal feedback is also helpful (e.g., touching the student or task, pointing, blocking or stopping an error as it is developing, and guiding the learner's movements). In addition, provide specific feedback on the student's work. For example, say, "This piece was cut exactly to the right size," or "You put these two parts together correctly," or "Try another way."
- Build the student's confidence by (a) using activities that will assure success, (b) assigning special tasks that communicate your confidence in the student, (c) giving the student an opportunity to correct his or her work before handing it in, and (d) displaying the student's good work.
- When teaching students how to make correct discriminations, use the "match to sample" technique in which the student is provided an example and a number of choices. The student's choice is based upon the characteristics of the sample.
- When helping the student to make correct discriminations when there are **minimal** differences between the stimuli, it may be necessary to (a) present the choices in an easy

form at first, (b) exaggerate attributes, (c) make the choices gradually harder, or (d) add and then fade out color cue, add and then gradually remove large cue differences, or combine these two approaches.

- You can improve a student's powers of retention and memory by (a) being systematic and presenting one new piece of learning at a time, (b) relating new material to familiar material and keeping it practical and concrete, and (c) using training techniques such as the total task method, chaining, modeling/demonstrating, and the structured overview.
- "Generalizing," or having the student apply what has been learned to the context, can be improved by (a) using examples from different relevant contexts and (b) practicing in settings similar to or exactly like those that will be encountered on the job.

Instructing Students Who Are Hearing-Impaired

- In private, discuss with the student his/her ability to communicate with you (consider lip/speech reading, use of a hearing aid, writing and signing ability, and total communication). An open discussion with the student that demonstrates your concern is an excellent beginning and builds rapport.
- Body language communicates messages, too. Remember not to give mixed messages with your body language. Also, be alert to the body message the student is giving you (e.g., is he/she communicating tension, nervousness, avoidance, or confusion?).
- If you will be working with an interpreter, do not treat the deaf student as if he/she were a third party. Speak directly to the student. Also, remember that the interpreter is ethically bound to interpret everything you say. Therefore, sensitive issues concerning the student are best addressed in a meeting before or after class. If you are using media where the room must be darkened, focus a small lamp on the interpreter.
- Maintain good eye contact with the student while speaking.
- Speak slowly and clearly, pronouncing each word, but without exaggerating or over-pronouncing.
- Do not stand in front of a window while speaking. The light should be shining on your face and not the student's.
- Try to rephrase a thought rather than saying the same words over again.
- Encourage the student to read ahead on class material.
- Try to keep the noise level down as much as possible in the class/laboratory.
- Use handouts, the chalkboard, and other media.
- Install a light to indicate when dangerous machinery is on.

Instructing Students Who Are Speech-Impaired

- Always maintain eye contact and nod your head while the student is talking. This will help the student build confidence.
- Work cooperatively with the speech therapist or communication specialist to determine which technique will help these students to communicate most effectively.
- Encourage peer tutoring and small group activities to help the speech-impaired student develop interpersonal relationships.
- Always allow sufficient time for the student to complete his/her sentence.
- Try not to act uncomfortable when these students are communicating with you (e.g., by discontinuing eye contact, shifting your position, or clearing your throat). Your discomfort can be very discouraging.
- Do not require these students to present oral reports until they feel comfortable in the classroom.
- Use correct sentence structure for the speech-impaired student so he/she can follow your example.
- Develop a list of technical terms used in your class, and share these terms with the speech specialist to help the students become more confident in their pronunciation.

Instructing Students Who are Visually Impaired

- Orient the student to the classroom or laboratory before the course begins. Consistency and orderliness in the physical environment are very important to the visually impaired student.
- Seat the blind student so that he/she will be able to hear the instruction; provide the best distance and lighting conditions for the partially sighted student.
- Provide as many opportunities as possible for the visually impaired student to observe closely or to touch the materials.
- Give materials and handouts to the student ahead of time. A student peer can help by making a carbon copy or a photocopy of the notes. When possible, the teacher can make a copy of the teaching notes. In this way the visually impaired student can review the materials with a tutor, have them transcribed into braille, or have them taped.
- It is important to gain and hold the student's attention. Approval and disapproval must be verbalized.
- Remember that there is no need to talk louder than usual to a visually impaired student.
- Rehabilitation counselors or special needs teachers can be useful resources in helping the student use commercial or modified learning aids and tools.
- Tests may need to be prepared in large print or braille or on cassette tapes, or converted into exercises that call on the sense of touch. Also, it may be necessary to allow the student extra time to complete the test.
- Audiotaping is the most frequently used technique for taking notes or preparing modified learning materials for the visually impaired student.
- Some specially designed machines are now available for the visually impaired student: (a) OPTACON (Optical to Tactile Converter) allows students to read printed material; (b) STEREO-TONER is similar to the OPTACON but converts the printed word into a tone pattern; (c) OPTOPHONE and VISOTACTOR convert print into sound; and (d) the KURZWEIL READING MACHINE converts standard English text on a computer into easily comprehended speech.
- General tools and aids to assist the student in reading or writing lessons for vocational courses include (a) braille, (b) large print, (c) tape recorders, (d) talking books, (e) raised letters, (f) slate and stylus (for taking notes), (g) braille writers (a six-key manually operated machine), (h) typewriters, (i) braille verifiers (type braille and regular copy simultaneously), and (j) signature guides.
- Aids for mathematics and computer programming courses include (a) abacus designed for the blind, (b) raised clock faces, (c) wire geometrical forms, (d) braille rulers, (e) raised-line checkbooks, (f) raised-line boards, (g) braille dominoes, (h) braille flashcards, (i) cubes with raised braille dots for simple mathematical problems, (j) raised-line paper and graphs, (k) computer terminals that use braille printers, or those that type braille and conventional type simultaneously, and (l) talking calculators.
- Aids used frequently in other vocational courses include (a) braille maps, charts, and diagrams, (b) self-threading needles, (c) wooden or cardboard models of specimens that other students see through microscopes, (d) braille micrometers and other shop tools that have raised markings, (e) braille demonstration tapes to mark lab equipment and models, (f) light probes with audible sounds that check the operating status of machines, and (g) guides or templates to help students align objects properly.

Instructing Students Who Are Seriously Emotionally Disturbed

- Consult with the student's parents, special education teacher, or counselor to determine whether any particular teaching techniques will help or hinder learning.
- Try to understand the student. Disturbing behaviors are the outward sign of inner turmoil.
- Go easy on bad days, and avoid direct confrontations that would aggravate the situation.

- Communicate acceptance to the student and a willingness to help him or her succeed in class.
- Provide immediate feedback and reinforcement.
- Establishing rapport and trust with the student is important.
- At the beginning of the semester, help the student gain confidence by giving him or her lessons in which success can be achieved in a series of small steps.
- A measure of privacy when the student attempts a new task can ease his or her embarrassment at any awkwardness or ineptness.
- To ease pressure, allow the student to correct his/her mistakes before turning in an assignment or project.
- Help the student not to overreact to failure, and praise him or her for continuing to try.
- Cue appropriate behavior in a quiet, unemotional manner.
- In resolving discipline problems: (a) do so in privacy, (b) focus on objective facts in a calm, supportive tone, (c) actively listen to the student, (d) after listening, reflect on what has been said by telling the student what you've heard, (e) ask the student if he or she has any ideas about solving the problem (encourage the student to be specific), and (f) conclude with a clear understanding of the changes, time-frame, and benefits that are expected.
- In handling aggressive behavior: (a) try to remain calm, and model the controlled behavior which you desire, (b) intervene by either separating the individuals involved and having them work on another activity or having them take a time-out in separate corners of the room, (c) if necessary, send an uninvolved student to the office to get someone to help, either by talking to the students or by managing the class while you deal with the problem, and (d) return to normal classroom procedure as quickly as possible.
- Call on professional colleagues in special education evaluation, counseling, or therapy when the student's behavior needs additional attention.

Instructing Students Who Are Orthopedically Impaired

- In general, students with physical handicaps will be intellectually capable and able to participate in vocational programs.
- Make the necessary modifications in classrooms, laboratories, equipment, building accessibility, and lavatories.
- For taking notes the student can (a) use a tape recorder, (b) have a classmate slip carbon paper into his/her notebook to duplicate notes, and/or (c) have the instructor prepare an outline of the lecture.
- For exams the instructor can (a) give oral exams, (b) have the student dictate answers into a tape recorder or to another student, or (c) use a typewriter/computer if the student is able to type/keystroke.
- Give the student extra time to complete homework assignments. Giving the student advance notice of assignments is also helpful.
- In the laboratory, pair the student with one or more capable classmates.
- Enlarged copies of frequently used charts and diagrams posted near the student's desk eliminate the necessity of paging through a book.

Instructing Students Who Are Other Health-Impaired

- Allow the student sufficient time for rest.
- Seat the student where he/she has the easiest access to necessary facilities (hall, lavatory, chalkboard, laboratory work stations).
- Allow the student to work at his or her own pace.
- Tape lectures so the student can listen at home.
- Work cooperatively with the health team in order to learn more about the student's special needs.

- Have community resource personnel (e.g., social workers and itinerant teachers homebound students) deliver materials, assignments, and handouts to homebound students.

Instructing Students Who Have Specific Learning Disabilities

- Use visual aids and demonstrations as often as possible.
- Use concrete examples whenever possible.
- Provide the student with an outline of what will be covered in class.
- Make sure all printed materials are clear and readable.
- Allow the student to tape-record assignments if he/she has a visual perception problem.
- Allow students to take tests orally or in a mode that compliments their performance.
- Present new information in small amounts.
- Make sure that writing assignments are relevant to the content of the program.
- Allow students extra time to complete assignments, if necessary.
- List assignments in steps.
- Use task analysis to lower the frustration level of these learners.
- Use programmed instruction materials when they will be effective.

Instructing Students with Limited English Proficiency (LEP)

- Recognize the student's cultural background, and allow for individual differences.
- Encourage these students to bring dictionaries to class.
- Use demonstrations and hands-on experience as much as possible.
- Speak slowly and use simple vocabulary and grammar.
- Use bright felt-tip markers to mark important words, passages, or illustrations.
- If possible, use a translator for important concepts.
- Work closely with LEP support personnel.
- Keep homework assignments short.
- Check for comprehension by asking the student to repeat what you have said.
- Use simple sentences when writing test items so the student can concentrate on answering the question rather than deciphering it.

Instructing Disadvantaged Students

Disadvantaged students typically dislike school, lack motivation, and have low self-esteem. Therefore, a teacher's personal commitment to and high expectations for these students may be two of the biggest single factors that will make a positive difference in their lives. Additionally, a teacher's good example (e.g., being patient, understanding, well organized, and a good manager) can be extremely valuable in motivating and positively shaping their behavior.

Vocational education teaches the disadvantaged student academic and social skills that can help him or her find employment. The following are additional techniques and teaching strategies that can be very useful to the teacher who works with disadvantaged students.

- The teacher should seek to understand the student's educational and social background through (a) assessment information, (b) interaction with former teachers, (c) discussions with counselors, and (d) visits with parents to ascertain the student's social limitations and home situation.
- Basic math, communication, and social skills should be reinforced. Math skills can be reinforced through hands-on learning activities. Communication skills can be improved by tactfully correcting poor grammar, when appropriate, and by providing resources that encourage reading about job-related interests. Social skills such as getting along with

people, grooming, proper dress, and respect for property and authority should be reinforced continually.

- The importance of graduating should be continually stressed. Relate acquisition of job skills to the ability to earn income.
- Improve the student's feelings of self-worth by having high expectations for him/her and by providing immediate approval of work done well.
- Simulate realistic job situations. All classroom and laboratory experiences should relate to employment in the occupation being studied.
- Disadvantaged students (as all students) will typically react to the learning environment in a responsible and mature manner when they are treated with respect and as adults by the teacher.
- Good organization and firm but not overbearing discipline are especially important. Generally, disadvantaged students want and need structure and discipline within their lives. Usually, these individuals will be responsive to and respect teachers who are firm, but sensitive.
- Help the student develop the skills necessary for finding, applying for, and retaining a job.
- Help the student establish good work habits by keeping him or her involved in meaningful learning experiences. Each activity should have concrete objectives.
- Disadvantaged students may need extra encouragement to stay on task; however, they still should be required to complete all assignments (just as they will be required to do on the job).
- Present instructions and information in clear, logical steps, building from the simple to the complex.
- Technical terms should be pronounced and explained clearly and concisely and written in language which the students will understand.
- Use a variety of teaching methods (e.g., demonstrations, resource personnel, field trips, peer tutors, role playing, audiovisual aids, and on-site work experiences).
- Present supplemental material when appropriate. If such material is relevant to the acquisition of job skills, the student will not be humiliated by simplified material.
- Highlight important parts of the student's text with a light marker to prevent the student from feeling overwhelmed by a large volume of reading material.
- Use progress charts to motivate disadvantaged students to master new skills.
- Use flashcards (teacher-made or commercial) to reinforce new terms and the ways to use tools and equipment.

GENERIC GUIDELINES AND INSTRUCTIONAL STRATEGIES

When teaching special needs students, it is very important that instructors not limit their teaching techniques. The following is a summary of techniques and strategies that could be considered generic to all special needs populations.

- Involve as many different senses as possible.
- Use concrete terms.
- Have students repeat important information.
- Use lists rather than paragraphs for written directions.
- Teach by demonstration.
- Use hand-over-hand assistance when necessary.
- Allow practice time.
- Break complex operations into smaller tasks.
- Provide immediate feedback.
- Build confidence.

- Help students make correct discriminations.
- Help students with their retention/memory.

- Build rapport.
- Use appropriate body language.
- Use appropriate techniques when working with an interpreter.
- Maintain good eye contact.
- Speak slowly and clearly.
- Rephrase thoughts when necessary.
- Encourage the student to read ahead.
- Keep the noise level down.
- Use various forms of media.
- Use lights to indicate when dangerous machinery is on.
- Work cooperatively with therapists.
- Encourage peer tutoring.
- Try not to act uncomfortable around special needs students.
- Help students feel comfortable.
- Model correct sentence structure.
- Develop a list of technical terms for students and therapists.

- Orient students before the course begins.
- Provide handouts ahead of time.
- Keep the student's attention.
- Use tape recorders for taking notes.
- Try to understand the student.
- Communicate acceptance.
- Develop activities that can help the students experience success.

- Use appropriate behavior-management techniques.
- Facilitate the students' note-taking.
- Facilitate the students' exam-taking.

- Pair students.
- Enlarge charts and diagrams.
- Use clear, readable visual aids frequently.
- Provide an outline of classroom material.

- Give writing assignments.
- Use task analysis when necessary.
- Allow for individual differences.
- Encourage students to bring a dictionary.
- Use a felt-tip marker to highlight important passages.
- Do not make homework assignments too lengthy.
- Use simple sentences when writing tests.

- Simulate realistic job situations.
- Treat all students with respect and dignity.
- Provide structure and organization.
- Use progress charts.
- Use flashcards.

BASIC SKILLS REMEDIATION

It is very important to note that to succeed in a vocational program some students may need to acquire one or more basic education skills (e.g., those for mathematics, reading, writing, speaking, listening, interpersonal relations, or reasoning.). Many employers will not hire an individual if he or she lacks these skills. Therefore, instruction in basic education skills may be necessary.

MODIFICATION OF THE CURRICULUM

Purpose of Curriculum Modification

The teacher may need to modify a special-needs student's curriculum to take into account his or her particular needs. The term *curriculum modification* can be defined as tailoring an existing curriculum to the unique needs of students as they pursue an occupational goal. However, it should be strongly emphasized that modifying a curriculum **does not** mean that a teacher should lower or alter the *standards* of his or her program. What it **does** mean is that the Admission Review and Dismissal (ARD) Committee (for handicapped students) or coordinated planning team (for disadvantaged and LEP students) determines which essential elements in the regular school curriculum would be appropriate to a student's needs. The *State Board of Education Rules for Curriculum* offers the following key points (Texas Education Agency, 1985):

1. For students with special needs, school districts shall provide modifications in methodologies, pacing, and materials to ensure that instruction is delivered, as appropriate, in the essential elements.
2. Students with special needs shall be instructed in those same essential elements in a manner appropriate to their needs.
3. School districts shall implement the provisions (under Chapter 75) in a manner which will enable all students to participate actively in a well-balanced curriculum and master, to the best of their abilities, the knowledge, skills, and competencies established through the essential elements.
4. Specialized personnel and regular program personnel shall be jointly responsible for the cooperative delivery of effective instruction in the essential elements, as appropriate.

Responsibilities of the Vocational Teacher

The primary responsibility of the vocational teacher in the curriculum modification process is to help the special needs student establish and reach realistic occupational goals. In an effort to accomplish this, the vocational teacher must identify the following:

1. Pertinent information about what will be taught in a vocational program
2. Necessary requirements for program completion
3. Multiple exit points (jobs that the learner can prepare for in a vocational program)
4. Entry-level competencies expected by employers for each of the exit points

It is also the responsibility of every vocational teacher to establish an effective and wholesome learning environment for his/her students. Doing this may involve modifying the vocational facility, equipment, tools, and/or instruction. Information on how to do this is provided in the following section.

MODIFICATION OF THE LEARNING ENVIRONMENT

The term *learning environment* refers to both the **physical** and **instructional** setting of the vocational classroom/laboratory. It is the responsibility of each vocational teacher to work at developing a learning environment that will contribute to the overall well-being and success of every student. The key factors found in a wholesome learning environment are those which promote:

1. **Safety, organization, and physical comfort.** In the vocational laboratory, it is absolutely crucial that each student abide by safety rules set by the instructor. In addition, the laboratory should be kept well organized and clean. A laboratory which is safe, well organized, and physically comfortable helps promote high morale and good work habits.
2. **Respect and acceptance.** Within an effective learning environment, students will show respect not only for the instructor but for each other as well. The instructor should be the student's best role model. The care and acceptance given by the instructor to each student (disabled or not) will go a long way in promoting peer acceptance, a positive attitude, and healthy self-esteem.
3. **Discipline.** A wholesome learning environment is one which promotes discipline and a positive self-concept within each student. Inappropriate behavior has the potential to seriously affect classroom safety, morale, and the overall learning process. Ways in which the instructor can help the student modify inappropriate behavior include (a) using the time-out technique, (b) developing student-teacher contracts, (c) ignoring negative behavior when possible, and (d) rewarding appropriate behavior with approval and praise.
4. **Flexibility.** An effective learning environment is flexible and can adapt to a special student's unique needs (e.g., slower rate of learning, inability to use regular tools/equipment, or remedial needs in reading or math). A flexible environment fosters individualized programs through which a special learner can develop marketable skills.

For information on modifying facilities, equipment, and tools for a vocational classroom, refer to the *Vocational Special Needs Teacher Training Curriculum*, available from the Extension Instruction and Materials Center.

The Texas Teacher Appraisal System

By Betty Helton, Certified TTAS Appraiser,
Marketing Education Teacher/Coordinator, Austin, Texas

The Texas Teacher Appraisal System (TTAS) is here to stay. Thus, it is to our advantage to examine it as closely as possible and to learn as much as possible about what the appraisers are looking for. This unit will help you to do that. It is **not** a complete description or explanation of the appraisal system, and it is **not** a substitute for the official TEA publication, *Teacher Appraisal System Teacher Orientation Manual*. However, it does address often misunderstood issues that are important to Texas teachers.

Historical Background

House Bill 72, enacted in 1984 by the 69th Texas State Legislature, directed the State Board of Education to adopt an appraisal process and criteria with which to appraise the performance of teachers for career ladder purposes. It mandated that these criteria be based upon observable, job-related behaviors. The system was to provide (1) at least two appraisals for each teacher (two observations by each of two appraisers); (2) a uniform training and certification process for appraisers; and (3) teacher self-appraisal as part of the appraisal process. A Teacher Appraisal Advisory Committee was appointed by the State Board to assist in the development of this appraisal system. That committee was composed of teachers, administrators, regional education service center personnel, and representatives from institutions of higher education.

A teacher appraisal instrument was developed and then refined through expert review, a pilot project in six Texas school districts, and input at public hearings. Approximately 13,000 appraisers were certified in the summer of 1986, after completing a 43-hour training course and meeting a minimum proficiency of 70% on knowledge of the system and in scoring videotaped segments of instruction. The Texas Teacher Appraisal System was implemented on a statewide basis in the fall of 1986. In 1987, the system was refined and all certified appraisers were required to be recertified.

The Texas teacher appraisal process is a systematic set of activities designed to assess teacher performance. It includes teacher assessment of instructional goals and outcomes, observations, conferences, development of growth plans, and completion and/or scoring of appropriate forms for each of these activities.

Foundations of the TTAS

The appraisal system is not intended to measure the "whole teacher." Instead, its intent is to evaluate observable classroom teaching skills for professional development purposes and for teacher placement on the career ladder. This system is based on a particular view of teaching and ideas that the State Board believes to be true. These foundations of the TTAS are as follows.

1. Teaching is an intentional act which has student growth as its goal. And, although classroom teaching is the system's primary focus, *no single model of teaching is mandated.*
2. There are common effective teaching characteristics that can serve as a basis for evaluation. All teachers, regardless of career ladder status, will be evaluated by these same criteria.
3. The difference between successful master and successful beginning teachers will be evidenced in the number of skills exhibited by the teachers at levels of quality which meet or exceed stated expectations.
4. Every teacher is capable of improving.
5. Appropriate classroom teaching behaviors may vary according to the learning goals and objectives of the lesson observed.

6. A more accurate appraisal can be gained by using multiple appraisers and multiple sources of information.

Selected Rules Governing the TTAS

The following section highlights selected rules governing the Texas Teacher Appraisal System. For more information, see the official TEA publication, *Teacher Appraisal System Teacher Orientation Manual*.

1. One appraiser must be the teacher's supervisor and hold an administrator or supervisor certification.
2. The second appraiser must be approved by the local school board, hold a valid teaching certificate, and have at least two years teaching experience. Teachers serving as appraisers must be on a level of the career ladder at least as high as the teacher being appraised. All appraisers must receive uniform appraiser training, reach the required standards of proficiency, and undergo periodic recertification.
3. Each teacher must receive an orientation prior to his or her first appraisal and receive a copy of the teacher appraisal orientation manual.
4. A *minimum* of two appraisals of each teachers will occur each year. A *minimum* of one formal observation of 45 consecutive minutes is required for each appraisal.
5. Either the teacher or the appraiser can request shorter unscheduled formal observations when the nature of the teaching assignment requires shorter instructional segments. If both parties agree, each observation may be comprised of two to three instructional segments of not less than 15 minutes each.
6. Appraisals must be conducted during the required days of instruction for students during the school year. Appraisals will *not* take place the first two weeks of the school year, the day before any official school holiday, or on any other days designated by the local board as inappropriate.
7. Teachers will be observed while teaching classes for which they are certified, whenever possible.
8. Only one appraiser may conduct a formal observation at a time.
9. A copy of the written appraisal record will be given to the teacher within seven working days of the formal observation.
10. If a teacher is deemed unsatisfactory in one or more domains during a formal observation, a conference between the teacher and the appraiser must be scheduled within 10 working days of the observation. (Extensions for emergencies must not extend past 15 working days.) If a teacher is judged less than satisfactory in one or more domains at the end of an appraisal period, a professional growth plan must be developed that provides at least one option that places no significant financial burden on the teacher or the local district.
11. A teacher with an overall summary performance score of satisfactory may request a growth plan.
12. Fulfillment of the provisions of a growth plan does not guarantee career ladder advancement.
13. A teacher may submit a written response to an observation record within 10 working days of receiving the record.
14. Each teacher will complete and submit the first part of the Teacher Assessment of Instructional Goals and Outcomes form (self-appraisal form) no later than the end of the second six weeks. He/she will complete the second part of the form during the week prior to the summative conference and submit it at that conference.
15. Each appraiser will score Domains I-IV, and the teacher's primary appraiser will score Domain V. Domain V will not be included in the computation of scores for career ladder placement.
16. An appraiser must provide written documentation when absent or below expectation is recorded for any indicator or when exceptional quality credit is granted for any criterion.

The TTAS Instrument

The following section highlights selected issues surrounding the Texas Teacher Appraisal System instrument. It also includes a listing of the domains, criteria, and indicators of the instrument. For more information, see the official TEA publication, *Teacher Appraisal System Teacher Orientation Manual*.

Terms and Concepts to Understand. Understanding the following terms and concepts is important to understanding the TTAS instrument.

Domain—a broad category of teaching behaviors or indicators of those behaviors.

Criterion—a subgroup of specific teaching behaviors or indicators of those behaviors.

Indicator—the actual unit of observation that must be observable, job related, and research based. Indicators can occur simultaneously.

85% vs 100% —some indicators require only that the designated behaviors occur a preponderance of the time—that is 85% of the time—to earn credit. Other indicators require that the behaviors always occur—100% of the time—to earn credit.

Exceptional Quality (EQ)—measured by quality (impact on students), quantity (how much), and preponderance (how often).

Domains. The Texas Teacher Appraisal System instrument includes 5 domains: instructional strategies, classroom management and organization, presentation of subject matter, learning environment, and professional growth and responsibilities.

Domain I—Instructional Strategies is a domain in which teaching strategies are the primary focus. The effectiveness of these strategies is judged by their observed impact upon the students' behaviors. The following apply to this domain.

- Credit is earned by evidence that the instructional strategies occur in preponderance (85% or more of the time).
- EQs may be earned with highly appropriate activities (how well) with intense student involvement (how much) throughout the observation period (how often).
- Credit may be lost through missed opportunities for extending, lack of ample "wait-time" (at least 3 seconds), and inappropriate levels of difficulty (either too hard or too easy).
- Evaluation of appropriate level of difficulty takes into consideration the students' ages, the students' attention spans, and the material's complexity.
- Observable formative evaluation of student progress by the teacher is important.
- Monitoring, reinforcement, and feedback behaviors must be specific, not global, and must involve as many students as possible.

Domain II—Classroom Management and Organization is a domain that measures teachers' administrative and management abilities. It is not related to instruction or to content. In this domain, the primary indicator is the teacher's ability to organize materials and students so as *to increase the probability of student learning*. The following apply to this domain.

- Preponderance (85% or more) is the issue in this domain. Do the students look as if they understand what is going on and are they able to follow through with instructions and routines in a way that enhances learning?
- Credit will be lost through procedures that are inappropriately sequenced, unorganized, or too organized and complex.
- Credit can be lost by showing favoritism, applying special rules to special students.
- Significant factors in criterion 5, manages student behavior, include (1) the degree to which students understand the teacher's expectations, (2) whether the teacher identifies inappropriate behavior, and (3) how quickly the teacher redirects inappropriate behavior. To gain credit, the teacher's response to inappropriate behavior must be immediate and direct; this response can be verbal or nonverbal.

- An EQ may be earned by providing responses or reinforcements that are (1) immediate; (2) direct; (3) apply to specific behaviors, either individual or global; and (4) consistent throughout the period to the degree that all students have an opportunity to receive them.

Domain III—Presentation of Subject Matter is focused on content, not on sequence or instructional strategies. The most important overall indicator of accomplishment in this domain is that a majority of the students experience success in understanding the subject most of the time. By and large, the appraiser looks to students for their reactions, interest, and questions that indicate the appropriateness and understanding of the content. The following apply to this domain.

- Critical content attributes must be presented in an understandable sequence and must be specifically emphasized.
- Drill and practice is not adequate.
- Credit will be lost by presenting one incorrect fact.
- Credit will be lost from two or more errors in spelling or written grammar or two or more errors in verbal grammar.
- EQs may be earned by (1) clearly emphasizing critical content attributes in desirable sequences, (2) teaching to many learning levels, and (3) expressing content in different modalities.

Domain IV—Learning Environment is the humane domain. Its primary focus is whether the teacher treats students with respect, students feel free to take learning risks, motivation and teacher support are evident, and the teacher personalizes the lesson to the students. The following apply to this domain.

- The appraiser looks for a preponderance of evidence (85% or more) that students are challenged in a positive way, that reluctant learners are encouraged, and that learning efforts are praised and reinforced.
- Correctives must be made in a positive way with the teacher showing regard for students as people.
- Credit may be lost through one occurrence of sarcasm or negative criticism.

Domain V—Professional Growth and Responsibilities is the domain that is scored only by the teacher's primary appraiser. It is not used for career ladder assignment, but it can be used as a consideration in contract renewal. The extent of extracurricular involvement can be evaluated here. Cumulative data can be very important in this domain (see following section).

Cumulative data. Cumulative data is written documentation of job-related teacher performance that is observed outside the formal classroom evaluation. It involves the teacher's day-to-day performance of his or her responsibilities and can become a part of the formal appraisal. The following apply to cumulative data.

- Additions to or deletions from the teacher's overall score can be made at any time before the summative conference.
- Each addition or deletion must be documented by the teacher's supervisor, the change must be initialed, and written evidence of the change must be presented to the teacher within 7 working days of the occurrence or the supervisor's knowledge of the occurrence.
- All cumulative data must be from a reliable source, factual, specific, dated, and have explicit or implicit relevance to the TTAS requirements.

Outline of Texas Teacher Appraisal Instrument

Domain I. Instructional Strategies

Criterion 1. *Provides opportunities for students to participate actively and successfully*

Indicator
- a. appropriately varies activities
- b. interacts with students in group formats as appropriate
- c. solicits student participation
- d. extends students' responses/contributions
- e. provides ample time for students to respond to teacher questions/solicitations *and* to consider content as it is presented
- f. implements instruction at an appropriate level of difficulty

Criterion 2. *Evaluates and provides feedback on student progress during instruction*

Indicator
- a. communicates learning expectations
- b. monitors students' performances as they engage in learning activities
- c. solicits responses or demonstrations from specific students for assessment purposes
- d. reinforces correct responses/performances
- e. provides corrective feedback/clarifies, or none needed
- f. reteaches, or none needed

Domain II. Classroom Management and Organization

Criterion 3. *Organizes materials and students*

Indicator
- a. secures student attention, or students are attending
- b. uses administrative procedures and routines which facilitate instruction
- c. gives clear administrative directions for classroom procedures or routines, or none needed
- d. maintains seating arrangements/grouping appropriate for the activity and the environment
- e. has materials, aids, and facilities ready for use

Criterion 4. *Maximizes amount of time available for instruction*

Indicator
- a. begins promptly/avoids wasting time at the end of the instructional period
- b. implements appropriate sequence of activities
- c. maintains appropriate pace
- d. maintains focus
- e. keeps students engaged

Criterion 5. *Manages student behavior*

Indicator
- a. specifies expectations for class behavior, or none needed
- b. uses techniques to prevent off-task behavior, or none needed
- c. uses techniques to redirect/stop inappropriate/disruptive behavior, or none needed
- d. applies rules consistently and fairly, or none needed
- e. reinforces desired behavior when appropriate

Domain III. Presentation of Subject Matter

Criterion 6. *Teaches for cognitive, affective, and/or psychomotor learning*

Indicator
- a. begins instruction/activity with an appropriate introduction
- b. presents information in an appropriate sequence
- c. relates lesson content to prior or future learning
- d. provides for definition of concepts and description of skills and/or attitudes and interests
- e. provides for elaboration of critical attributes of concepts, skills, and/or attitudes and interests
- f. stresses generalization, principle, or rule as a relationship between or among concepts, skills, or attitudes/interests
- g. provides opportunities for application
- h. closes instruction appropriately

Criterion 7. *Uses effective communication skills*

Indicator
- a. make no significant errors
- b. explains content and/or learning tasks clearly
- c. stresses important points and dimensions of content
- d. uses correct grammar
- e. uses accurate language
- f. demonstrates skill in written communication

Domain IV. Learning Environment

Criterion 8. *Uses strategies to motivate students for learning*

Indicator
- a. relates content to student interests/experiences
- b. emphasizes the value/importance of the activity or content
- c. reinforces/praises learning efforts of students
- d. challenges students

Criterion 9. *Maintains supportive environment*

Indicator
- a. avoids sarcasm and negative criticism
- b. establishes climate of courtesy and respect
- c. encourages slow and reluctant student
- d. establishes and maintains positive rapport with students

Domain V. Professional Growth and Responsibilities

Criterion 10. *Plans for and engages in professional development*

Indicator
- a. shows progress in completing professional growth requirements as agreed upon with appraiser(s), or none needed
- b. stays current in content taught
- c. stays current in instructional methodology

Criterion 11. *Interacts and communicates effectively with parents*

Indicator
- a. initiates communications with parents about student performance and/or behavior when appropriate
- b. conducts parent-teacher conferences in accordance with local district policy
- c. reports student progress to parents in accordance with local district policy
- d. maintains confidentiality unless disclosure is required by law

Criterion 12. *Complies with policies, operating procedures, and requirements*

Indicator
- a. follows statutory and Texas Education Agency regulations
- b. follows district and campus policies and procedures
- c. performs assigned professional duties
- d. follows district promotion/retention policy and procedures

Criterion 13. *Promotes and evaluates student growth*

Indicator
- a. participates in campus goal-setting for student progress
- b. plans instruction in accordance with district requirements
- c. documents student progress
- d. maintains accurate records
- e. reports student progress at appropriate intervals

Section Two

Materials for Developing a Scope and Sequence

- Description of the textbook and its support materials
- Chapters in *Retail Merchandising, 10th Edition,* with correlations to specific essential elements
- Correlation chart for State-adopted text chapters, materials from EIMC-Educational Resources, and essential elements
- Overview of a Recommended Scope and Sequence
- Worksheet for Teacher Revision of Overview
- Worksheets for Using a Recommended Scope and Sequence to Develop an Instructional Schedule
- Worksheets for Developing an Alternate Scope and Sequence

Note: All sheets may be copied.

Description of *Retail Merchandising: Consumer Goods and Services, 10th Edition*

Textbook for Retail Merchandising Course

Retail Merchandising: Consumer Goods and Services, 10th Edition. Published 1988 by South-Western Publishing Co., Cincinnati, Ohio. Written by Harland E. Samson, professor of Marketing Education and dean, Division of Summer Sessions and Inter-College Programs, University of Wisconsin at Madison; and Wayne G. Little, professor of Marketing Education and associate dean, College of Business, St. Cloud State University, St. Cloud, Minnesota.

Beginning with the 1991-92 school year, this is the only state-adopted text for the Retail Merchandising course. In some ways it is a more self-sufficient publication than previous texts have been. Because there is only one text, it has been possible to streamline the scope and sequence as well as other materials in the revised coordinator's guide. The text has more than 600 content pages, with 55 chapters arranged in nine units.

The teacher's manual for the text has this comment:

> "For students planning to enroll in a four-year college, a course on the concepts in this book is an ideal way to introduce them to careers in merchandising. *Retail Merchandising: Consumer Goods and Services* is designed for the student who has a genuine desire to explore career opportunities in retail marketing."

The *Teacher's Manual* was designed to make it easier for teachers to use the most current strategies of instruction. In addition, the text is supported by a student activity workbook, tests, and test-maker software. The publisher has available, from the same authors, a publication for an independent unit of study, *Hillcrest Mall: A Retail Merchandising Project,* meant for students with a basic understanding of the retailing process.

The recommended scope and sequence that follows correlates the text to a 1/2-credit, one-semester course. Materials other than those in the text may be helpful, and possible places for their inclusion have been suggested.

Related Materials from EIMC–Educational Resources

In some cases, instruction for this course might be enhanced by using the following materials from EIMC. Many of the publications will already be available in Marketing Education classrooms.

Preparing to Succeed in Marketing. This 1992 revision of an existing favorite has added sections that include most of the common essential elements.

Mathematics: Essential to Marketing. The 34 assignments in this student manual make it an all-inclusive publication useful in all Marketing Education classrooms. It addresses the marketing math for ME I as well as personal mathematics cited in the common essential elements.

Higher Level Thinking in Marketing Education offers activities based on marketing content that are designed to help develop thinking skills.

Balancing the Curriculum for Marketing Education is designed so that marketing content can be used to develop academic skills.

The teacher who decides to address the common essential elements in this course rather than elsewhere may find the following Educational Resources materials useful:

- *Parliamentary Procedure*—includes a student manual, answer book/tests, and five computer-assisted instruction sets for Apple II use
- *Destination Leadership*—includes a training manual for students and a leader's guide.
- Even though this is not a co-op course, individualized manuals for specific co-op placements can also strengthen the course. They can make it possible to relate content to specific jobs; they provide information on career development; and they often cover safety.

Chapters in *Retail Merchandising, 10th Edition*

All of the essential elements for the course will be addressed if all of the chapters are covered. Several chapters are recommended in the later scope and sequence even though they do not address specific elements.

Titles	Elements
Unit 1, Dynamics of Retailing	
Chapter 1, Retail Marketing	(1)(A)(B), (2)(A)
Chapter 2, Organization	(1)(A)
Chapter 3, Personnel	(1)(C)
Chapter 4, Merchandising	(1)(A)(B)
Chapter 5, Promotion	(5)(A)(D)
Chapter 6, Selling	(4)(B)(D)(F)
Chapter 7, Operations and Control	None
Chapter 8, Future of Retailing	(1)(D), (2)(B)(F), (4)(E)
Unit 2, Retailing Business	
Chapter 9, Production and Distribution of Merchandise	(1)(A)
Chapter 10, Private Enterprise	(2)(A)(C)(D), (4)(E)
Chapter 11, Types of Retail Businesses	(1)(B), (4)(A)
Chapter 12, Types of Business Ownership	(2)(E)
Chapter 13, Business Locations	(4)(A)
Chapter 14, Obtaining Business Space	None
Chapter 15, Special Retail Businesses	(1)(C), (2)(A)(B)
Unit 3, Personnel	
Chapter 16, Personnel Policies	(6)(B)
Chapter 17, Locating and Selecting Employees	None
Chapter 18, Training Employees	None
Chapter 19, Working with Others	None
Chapter 20, Effective Supervision	None
Unit 4, Merchandising	
Chapter 21, Planning and Budgeting	(3)(E)(H)
Chapter 22, Product Lines and Assortments	None
Chapter 23, Selecting and Buying Merchandise	(3)(H)
Chapter 24, Negotiations with Suppliers	(3)(G)
Chapter 25, Markups and Markdowns	(3)(G)
Chapter 26, Pricing Merchandise	(3)(G)
Unit 5, Promotion	
Chapter 27, Selecting Goods for Promotion	(5)(A)
Chapter 28, Advertising Media	(5)(B)
Chapter 29, Preparing Advertisements	(5)(C)

Chapter 30, Advertising Strategies	(5)(D)
Chapter 31, Retail Store Displays	(5)(E)
Chapter 32, Designing Displays	(5)(E)
Chapter 33, Installing Displays	(5)(E)
Unit 6, Selling	
Chapter 34, Duties and Characteristics of Retail Sales Personnel	(6)(B)
Chapter 35, Customer Buying Behavior	(4)(E)
Chapter 36, The Sales Presentation	(4)(C)(D)
Chapter 37, Closing the Sale	(4)(D)
Chapter 38, Completing the Sales Transaction	(6)(D)
Chapter 39, Special Skills in Selling	(3)(D)
Unit 7, Operations	
Chapter 40, Store Layout and Maintenance	(3)(C), (6)(A)
Chapter 41, Service Policies	(6)(B)
Chapter 42, Credit and Collection Policy	(6)(C)
Chapter 43, Handling Incoming Merchandise	(3)(A)
Chapter 44, Marking and Stocking Merchandise	(3)(A)
Chapter 45, Stock Management and Control	(3)(B)(D)
Unit 8, Control	
Chapter 46, Financing a Business	None
Chapter 47, Merchandise Records	(3)(F)
Chapter 48, Sales and Expense Records	None
Chapter 49, Tax Expense Records and Financial Statements	None
Chapter 50, Retail Information Systems	(6)(D)
Unit 9, Future of Retailing	
Chapter 51, Research in Retailing	(2)(B)(F)
Chapter 52, Technological Advances in Retailing	(1)(D), (6)(D)
Chapter 53, Changing Practices in Retailing	(1)(D)
Chapter 54, Your Future in Retailing	(1)(C)
Chapter 55, Planning a Future in Retailing	(1)(C)

Correlation Chart

(for State-Adopted Text *Retail Merchandising: Consumer Goods and Services*, EIMC Materials, and the Essential Elements for the Retail Merchandising Course)

(m) Retail Merchandising (1/2 unit) may be taught by the laboratory method of instruction.

Textbook Chapters	Element Addressed
	(1) Retailing
1, 2, 4, 9	(A) understand the meaning of retailing and merchandising;
1, 4, 11	(B) understand the various types and kinds of retail establishments;
3, 54, 55	(C) explore the retailing careers available; and
8, 52, 53	(D) explore trends in retailing.
	(2) Economics and marketing
1, 10	(A) recognize the role of the consumer in retailing;
8, 51	(B) determine the kinds of consumer information needed by retailers;
10	(C) understand the concept and need of a business producing a profit;
9, 10	(D) examine the role of retail merchandising in a free or private enterprise system;
12	(E) describe the characteristics of different kinds of business ownership; and
8, 51	(F) recognize how market research is used by retailers.
	(3) Merchandising
43, 44	(A) determine the importance of accuracy and efficiency in receiving, checking, and marking merchandise;
45	(B) understand the importance of stockkeeping, handling, and caring for stock;
40	(C) recognize the need for general safety practices;
39, 45	(D) learn ways to prevent shortage, damage, and theft of merchandise;
21	(E) explain stock turnover;
47	(F) explain inventory control systems;
24, 25, 26	(G) understand the basic calculations related to retailing; and
21, 23	(H) examine the elements and use of a merchandise plan.
	(4) Selling
11, 13	(A) distinguish between convenience, shopping, and specialty goods;
6	(B) recognize the need for knowledge of product or service being sold;
36	(C) distinguish between personal and nonpersonal selling;
6, 36, 37	(D) identify the steps of personal selling;
8, 10, 35	(E) recognize the importance of understanding consumer behavior; and
6	(F) explore selling careers.

	(5) Promotion
5, 27	(A) understand that advertising, display, and personal seling are the principal forms of promotion;
28	(B) recognize the commonly used media for retail advertising;
29	(C) understand the basic elements of newspaper advertising;
5, 30	(D) understand promotional mix; and
31, 32, 33	(E) understand the principles of display.
	(6) Store operation
40	(A) understand the need for store security;
34, 41	(B) explain the importance of store policies;
42	(C) understand why retailers offer credit; and
38, 50, 52	(D) identify areas of retail merchandising where computer technology is used.

Other Sources	**Common Essential Elements**
Parliamentary Procedure and *Destination Leadership*	**(1) Leadership concepts and skills** (A) demonstrate skills, characteristics and responsibilities of leaders and effective group members; (B) demonstrate a knowledge of parliamentary procedure principles; (C) plan and conduct leadership activities; and (D) prepare for effective citizenship and for participation in our democratic society.
Various EIMC manuals for co-op use have safety content.	**(4) Safety and safe working conditions** (A) identify and apply safe working practices to all training situations

Note: Essential elements are not cited for chapters 7, 14, 17, 18, 19, 20, 22, 46, 48, and 49, even though they are included in the recommended scope and sequence.

Overview of a Recommended Scope and Sequence

All of the Retail Merchandising essential elements are covered in this scope and sequence. Essential elements for the course are not present in nine of the 55 chapters in the text, although some of those chapters are recommended for inclusion. Chapters for which essential elements have not been cited are 7, 14, 17, 18, 19, 22, 46, 48, and 49.

Week	Chapters	Elements Addressed
	First Six Weeks	
1	Chapter 1, Retail Marketing	(1)(A)(B), (2)(A)
	Chapter 2, Organization	(1)(A)
	Chapter 3, Personnel	(1)(C)
2	Chapter 4, Merchandising	(1)(A)(B)
	Chapter 5, Promotion	(5)(A)(D)
	Chapter 6, Selling	(4)(B)(D)(F)
3	Chapter 10, Private Enterprise	(2)(A)(C)(D), (4)(E)
	Chapter 9, Production and Distribution of Merchandise	(1)(A)
	Chapter 11, Types of Retail Businesses	(1)(B), (4)(A)
4	Chapter 12, Types of Business Ownership	(2)(E)
	Chapter 15, Special Retail Businesses	(1)(C), (2)(A)(B)
	Chapter 21, Planning and Budgeting	(3)(E)(H)
5	Chapter 22, Product Lines and Assortments	None
	Chapter 23, Selecting and Buying Merchandise	(3)(H)
	Chapter 24, Negotiations with Suppliers	(3)(G)
6	Chapter 25, Markups and Markdowns	(3)(G)
	Chapter 26, Pricing Merchandise	(3)(G)
	Reteach/evaluate	
	Second Six Weeks	
7	Chapter 16, Personnel Policies	(6)(B)
	Chapter 17, Locating and Selecting Employees	None
	Chapter 34, Duties and Characteristics of Retail Sales Personnel	(6)(B)
8	Chapter 19, Working with Others	None
	Chapter 7, Operations and Control	None
	Chapter 13, Business Locations	(4)(A)
9	Chapter 14, Obtaining Business Space	None
	Chapter 40, Store Layout and Maintenance	(3)(C), (6)(A)
	Chapter 41, Service Policies	(6)(B)
10	Chapter 42, Credit and Collection Policy	(6)(C)
	Chapter 43, Handling Incoming Merchandise	(3)(A)
	Chapter 44, Marking, Stocking Merchandise	(3)(A)
11	Chapter 45, Stock Management and Control	(3)(B)(D)
	Chapter 46, Financing a Business	None

Week	Chapters	Elements Addressed
	Chapter 47, Merchandise Records	(3)(F)
12	Chapter 48, Sales and Expense Records	None
	Chapter 49, Tax Expense Records and Financial Statements	None
	Chapter 50, Retail Information Systems	(6)(D)
	Reteach/evaluate	

Third Six Weeks

13	Chapter 27, Selecting Goods for Promotion	(5)(A)
	Chapter 28, Advertising Media	(5)(B)
	Chapter 29, Preparing Advertisements	(5)(C)
14	Chapter 30, Advertising Strategies	(5)(D)
	Chapter 31, Retail Store Displays	(5)(E)
	Chapter 32, Designing Displays	(5)(E)
15	Chapter 33, Installing Displays	(5)(E)
	Chapter 35, Customer Buying Behavior	(4)(E)
	Chapter 36, The Sales Presentation	(4)(C)(D)
16	Chapter 37, Closing the Sale	(4)(D)
	Chapter 38, Completing the Sales Transaction	(6)(D)
	Chapter 39, Special Skills in Selling	(3)(D)
17	Chapter 8, Future of Retailing	(1)(D), (2)(B)(F), 4(E)
	Chapter 51, Research in Retailing	(2)(B)(F)
	Chapter 52, Technological Advances in Retailing	(1)(D), (6)(D
18	Chapter 53, Changing Practices in Retailing	(1)(D)
	Chapter 54, Your Future in Retailing	(1)(C)
	Chapter 55, Planning a Future in Retailing	(1)(C)
	Reteach/Evaluate	

Worksheet for Teacher Revision of Overview

Week	Chapter(s)	Element(s) Addressed

First Six Weeks

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________

Second Six Weeks

7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________
11. ______________________________
12. ______________________________

Third Six Weeks

13. ______________________________
14. ______________________________
15. ______________________________
16. ______________________________
17. ______________________________
18. ______________________________

Worksheets for Using a Recommended Scope and Sequence for Retail Merchandising, Based on *Retail Merchandising, 10th edition*

Comments: These pages may be copied to make worksheets for your plans. The left column is for actual dates. The middle column has the recommended sequence. The right column indicates where other notes might be included. It's also convenient for other details, such as tests and DECA activities. A similar form without entries is provided later.

The committee recommends that a test be given after each chapter, as well as unit tests. The sequence should include time for tests.

Week /dates	Chapters to cover	Additional activities and instruction
	First Six Weeks	
Week 1		
	Chapter 1, Retail Marketing	
	2, Organization	
	3, Personnel	
		Allow time for
		administrative details of
		starting the school year
Week 2		
	4, Merchandising	
	5, Promotion	
	6, Selling	
Week 3		
	10, Private Enterprise	
	9, Production and Distribution of Merchandise	
	11, Types of Retail Business	

Week 4		
	12, Types of Business Ownership	
	15, Special Retail Businesses	
	21, Planning and Budgeting	
Week 5		
	22, Product Lines and Assortments	
	23, Selecting and Buying Merchandise	
	24, Negotiations with Suppliers	
Week 6		
	25, Markups and Markdowns	
	26, Pricing Merchandise	
	Reteach/evaluate	

Second Six Weeks

Week 7		
	16, Personnel Policies	
	17, Locating and Selecting Employees	
	34, Duties and Characteristics of Retail Sales	
	Personnel	
Week 8		
	19, Working with Others	
	7, Operations and Control	
	13, Business Locations	

Week 9		
	14, Obtaining Business Space	
	40, Store Layout and Maintenance	
	41, Service Policies	
Week 10		
	42, Credit and Collection Policy	
	43, Handling Incoming Merchandise	
	44, Marking and Stocking Merchandise	
Week 11		
	45, Stock Management and Control	
	46, Financing a Business	
	47, Merchandise Records	
Week 12		
	48, Sales and Expense Records	
	49, Tax Expense Records and Financial	
	Statements	
	50, Retail Information Systems	
	Reteach/evaluate	

Third Six Weeks

Week 13		
	27, Selecting Goods for Promotion	
	28, Advertising Media	
	29, Preparing Advertisements	
Week 14		
	30, Advertising Strategies	
	31, Retail Store Displays	
	32, Designing Displays	
Week 15		
	33, Installing Displays	
	35, Customer Buying Behavior	
	36, The Sales Presentation	
Week 16		
	37, Closing the Sale	
	38, Completing the Sales Transaction	
	39, Special Skills in Selling	
Week 17		
	8, Future of Retailing	
	51, Research in Retailing	
	52, Technological Advances in Retailing	

Week 18		
	53, Changing Practices in Retailing	
	54, Your Future in Retailing	
	55, Planning a Future in Retailing	
	Reteach/evaluate	

Worksheets for Developing a Scope and Sequence for Retail Merchandising

Comments: These pages may be copied. The middle column has been left blank this time. The right column allows space for instructional notes as well as other details, such as tests and DECA activities. You will find a recommended sequence on page 52.

Week /dates	Chapters to cover	Additional activities and instruction

First Six Weeks

Week 1		
		Allow time for
		administrative details of
		starting the school year
Week 2		
Week 3		
Week 4		

Week 5		
Week 6		

Second Six Weeks

Week 7		
Week 8		
Week 9		
Week 10		
Week 11		
Week 12		

Third Six Weeks

Week 13		
Week 14		
Week 15		
Week 16		
Week 17		
Week 18		

Section Three

Instructional Planner Sheets

(based on chapters in *Retail Merchandising, 10th Edition)*

- A separate planner sheet is provided for each chapter, so planners can be rearranged easily to compare the results of different sequences of instruction.

- By using the planners the teacher can ensure that everything is being covered, as well as know when, and how.

- Planners are printed only on the front, for convenient comparison with other planners.

- Each planner
  - – identifies the essential element(s) that the chapter best addresses
  - – provides useful comments
  - – cites chapter outcomes
  - – lists chapter subheads

Note: All sheets may be copied.

Instructional Planner for Chapter 1, Retail Marketing

Chapter 1 addresses the following essential elements:

(m) Retail Merchandising
    (1) Retailing
        (A) understand the meaning of retailing and merchandising
        (B) understand the various types and kinds of retail establishments
    (2) Economics and marketing
        (A) recognize the role of the consumer in retailing

Comments: This is the first chapter in Unit 1, Dynamics of Retailing. This chapter and those that follow do not have a separate "words to know" section, although they do ask for definitions in some objectives. A list of "Top Twenty Terms" appears with the last chapter in each unit, together with other material for enhancing learning.

INDICATORS OF CHAPTER 1 CONTENT

Outcomes concern:

1. marketing, retailing, and retailers
2. the Purpose of retailing
3. the value of retail marketing to consumers
4. three types of retail marketing businesses
5. the four main forms of retail business ownership
6. career opportunities available in retail marketing
7. characteristics of successful retail management

Chapter Subheads

The purpose of Retail Marketing
Value to Consumers
Types of Retail Marketing
- In-Store Retailing
- Mail-Order Retailing
- Direct Retailing
- Automatic Retailing
- Other Types of Retailing

Kinds of Retail Businesses
- Number of Retail Firms
- Sales by Retail Firms
- Employment in Retailing

Ownership of Retail Businesses
Careers in Retailing
Successful Retail Management

Illustrations include tables on number of retail establishments, sales by kind of retail business, and total labor force and employment in retail and wholesale trades.

Instructional Planner for Chapter 2, Organization

Chapter 2 addresses the following essential element:

(m) Retail Merchandising
    (1) Retailing
        (A) understand the meaning of retailing and merchandising

Comments: This is the second chapter in Unit 1, Dynamics of Retailing.

INDICATORS OF CHAPTER 2 CONTENT

Outcomes concern:

1. the four steps in setting up a simulated business organization
2. the differences between formal and informal organization
3. examples of activities performed in each of the four retail functions
4. how small business organization differs from large business organization
5. how informal organization would operate in a large retail business
6. business organization versus business policy

Chapter Subheads

Basic Business Organization
- Formal Organization
- Informal Organization
- Retail Functions

Small Business Organization
Large Business Organization
- Buying
- Selling
- Operations
- Control
- Central Organization

Organization Versus Policy

Illustrations include organization charts for small and large businesses.

Instructional Planner for Chapter 3, Personnel

Chapter 3 addresses the following essential element:

(m) Retail Merchandising
  (1) Retailing
    (C) explore the retailing careers available

Comments: This is the third chapter in Unit 1, Dynamics of Retailing.

INDICATORS OF CHAPTER 3 CONTENT

Outcomes concern:

1. potential for employment in the retailing field
2. basic retailing activities
3. major retail employers and the kinds of positions they offer
4. recruitment techniques retailers use to locate potential employees
5. selection and training procedures followed by retail employers
6. opportunities for advancement available in retailing

Chapter Subheads

Beginning a Retailing Career
Understanding Basic Retailing Activities
- Buying
- Selling
- Store Operations
- Control

Kinds of Retail Careers
- Department and Limited Line-Stores
- Chain Stores
- Retail Franchises

Employing Retail Personnel
- Selecting Retail Personnel
- Training Retail Personnel

Career Advancement in Retailing

Illustrations include a list of retail store occupations with weekly wages.

Instructional Planner for Chapter 4, Merchandising

Chapter 4 addresses the following essential elements:

(m) Retail Merchandising
  (1) Retailing
    (A) understand the meaning of retailing and merchandising
    (B) understand the various types and kinds of retail establishments

Comments: This is the fourth chapter in Unit 1, Dynamics of Retailing.

INDICATORS OF CHAPTER 4 CONTENT

Outcomes concern:

1. the four kinds of merchandise
2. merchandise mix
3. difference between merchandise breadth and merchandise depth
4. features of a quality product
5. a one-price policy
6. the advantages of a price-line policy
7. what should be included in a merchandise plan

Chapter Subheads

Kinds of Merchandise
Merchandise Mix
- Merchandise Breadth
- Merchandise Depth

Quality of Merchandise
Style of Merchandise
Pricing Merchandise
- Price Competition
- One-Price Policy
- Price-Line Policy
- Other Price Policies

Merchandise Planning

Illustrations include a depiction of merchandise depth and breadth.

Instructional Planner for Chapter 5, Promotion

Chapter 5 addresses the following essential elements:

(m) Retail Merchandising
  (5) Promotion
    (A) understand that advertising, display, and personal selling are the principal forms of promotion
    (D) understand promotional mix

Comments: This is the fifth chapter in Unit 1, Dynamics of Retailing

INDICATORS OF CHAPTER 5 CONTENT

Outcomes concern:

1. promotion and how store policies affect its use
2. models that explain how communication takes place between sellers and buyers
3. what motivates consumers to make buying decisions
4. appeals merchants can use to motivate customers to buy
5. the promotional methods used by retailers
6. promotional mix and the primary purpose of promotion

Chapter Subheads

Store Promotion Policies
Communication Models
Customer Motivation
- Needs and Wants
- Rational and Emotional Appeals
- Purpose of Promotion

Promotional Methods
- Retail Advertising
- Visual Merchandising
- Publicity

Promotional Mix

Illustrations include diagrams of communication models.

Instructional Planner for Chapter 6, Selling

Chapter 6 addresses the following essential elements:

(m) Retail Merchandising
  (4) Selling
    (B) recognize the need for knowledge of product or service being sold
    (D) identify the steps of personal selling
    (F) explore selling careers

Comments: This is the sixth chapter in Unit 1, Dynamics of Retailing.

INDICATORS OF CHAPTER 6 CONTENT

Outcomes concern:

1. importance of selling in retailing
2. qualifications necessary to be an effective salesperson
3. various types of retail selling careers
4. a selling process that can be used effectively in most retail stores
5. various special selling and support skills needed in a retail sales position

Chapter Subheads

Qualifications of Successful Sales Personnel
Types of Retail Sales Jobs
- Salesclerk
- Sales Demonstrator
- Salesperson
- Sales Representative

Selling Merchandise and Services
- Preapproach
- Approach
- Determining Customer Wants and Needs
- Presenting-Demonstrating Merchandise
- Answering Questions and Objections
- Closing the Sale
- Suggestion Selling
- Customer Departure

Special Selling Skills
Sales Supporting Skills
- Stockkeeping
- Housekeeping
- Preventing Waste and Loss
- Directing Customers
- Store Policy
- Receiving, Checking, and Marking
- Merchandise Information

Instructional Planner for Chapter 7, Operations and Control

Note: The advisory committee did not identify any essential elements covered by this chapter, but it is recommended and *is* included in the suggested scope and sequence.

Comments: This is the seventh chapter in Unit 1, Dynamics of Retailing.

INDICATORS OF CHAPTER 7 CONTENT

Outcomes concern:

1. six duties of the operations division of a store
2. the importance of a good control system for a store
3. control system
4. desired characteristics of a control system
5. five essential records needed by a business
6. information contained in an income statement and in a balance sheet
7. the control process that will lead to effective management

Chapter Subheads

Operations
Control
What Is a Control System?
Essential Records
The Control Process
- Standards of Performance
- Measures of Current Performance
- Corrective Action

Illustrations include a diagram of the merchandising cycle that indicates essential records, and a sample performance appraisal form.

Instructional Planner for Chapter 8, Future of Retailing

Chapter 8 addresses the following essential elements:

(m) Retail Merchandising
    (1) Retailing
        (D) explore trends in retailing
    (2) Economics and marketing
        (B) determine the kinds of consumer information needed by retailers
        (F) recognize how market research is used by retailers
    (4) Selling
        (E) recognize the importance of understanding consumer behavior

Comments: This is the eighth and last chapter in Unit 1, Dynamics of Retailing. As such it includes exercises titled "Checking Key Points," "Top Twenty Terms," "Retail Calculations," "Working with People," "Writing Skills," "Applying Knowledge," and "Continuing Project," all of which cover the entire unit.

INDICATORS OF CHAPTER 8 CONTENT

Outcomes concern:

1. forces that are affecting consumer lifestyles
2. three technological changes that will affect the future of retailing
3. typical retailing problems that retailing research can help solve
4. some general procedures that can be followed when conducting retailing research
5. importance of self-assessment and job-seeking skills in starting a retailing career
6. importance of career planning and education in preparing for a career in retailing

Chapter Subheads

Future Consumers
- Population and Income Trends
- Mobility
- Personal Values
- Consumerism

Future Technology
- Consumer Video Ordering Systems
- Electronic Banking and Payment Systems
- Checkout and Point-of-Sale Systems

Retailing Research

Starting a Retailing Career
- Self-Assessment
- Seeking Employment

Planning a Future Retailing Career

Instructional Planner for Chapter 9, Production and Distribution of Merchandise

Chapter 9 addresses the following essential element:

(m) Retail Merchandising
    (1) Retailing
        (A) understand the meaning of retailing and merchandising

Comments: This is the first chapter in Unit 2, Retailing Businesses.

INDICATORS OF CHAPTER 9 CONTENT

Outcomes concern:

1. how the four merchandise utilities are created
2. the terms *extraction, manufacturing*, and *construction*
3. four different channels of distribution
4. advantages a retailer may gain by purchasing from wholesalers
5. two types of agent middlemen
6. physical distribution versus channels of distribution

Chapter Subheads

Merchandise Utilities
Production
- Extraction
- Manufacturing
- Construction
- Modern Production Technology

Distribution
- Producer Directly to Consumer
- Channels with One Middleman
- Channels with Two Middlemen
- Channels with Three Middlemen
- Choice of Channels

Physical Distribution

Instructional Planner for Chapter 10, Private Enterprise

Chapter 10 addresses the following essential elements:

(m) Retail Merchandising
  (2) Economics and marketing
    (A) recognize the role of the consumer in retailing
    (C) understand the concept and need of a business producing a profit
    (D) examine the role of retailing in a free or private enterprise system
  (4) Selling
    (E) recognize the importance of understanding consumer behavior

Comments: This is the second chapter in Unit 2, Retailing Businesses.

INDICATORS OF CHAPTER 10 CONTENT

Outcomes concern:

1. defining *economic system*
2. the main difference between a directed economy and a free economy
3. major elements necessary for a private enterprise system
4. how competition serves as an invisible control of business
5. relationship of gross national product, net national product, and national income
6. three kinds of consumer income and spending information that are helpful to retailers

Subheads in chapter

Elements of an Economic System
Elements of Private Enterprise
- Property Ownership
- Competition
- Profit Motivation
- Matching Supply and Demand
- Freedom of Choice

Measures of an Economy
- The United States Economy
- Consumer Income and Spending

Illustrations in this chapter include a diagram of the private enterprise system and a table showing personal consumer expenditures.

Instructional Planner for Chapter 11, Types of Retail Businesses

Chapter 11 addresses the following essential elements:

(m) Retail Merchandising
    (1) Retailing
        (B) understand the various types and kinds of retail establishments
    (4) Selling
        (A) distinguish between convenience, shopping, and specialty goods

Comments: This is the third chapter in Unit 2, Retailing Businesses.

INDICATORS OF CHAPTER 11 CONTENT

Outcomes concern:

1. characteristics of a small store retail business
2. convenience goods versus shopping goods
3. five major types of large store businesses
4. characteristics of a department store
5. why low margin stores are able to offer goods at reduced prices
6. advantages of size to a large or small retail business

Chapter Subheads

Small Store Retailing
- Convenience Goods Stores
- Shopping Goods Stores
- Service Businesses

Large Store Retailing
- Department Stores
- Variety Stores
- Supermarkets
- Low-Margin Stores
- Mail-Order Firms

Advantages of Size

Instructional Planner for Chapter 12, Types of Business Ownership

Chapter 12 addresses the following essential element:

(m) Retail Merchandising
  (2) Economics and marketing
    (E) describe the characteristics of different types of business ownership

Comments: This is the fourth chapter in Unit 2, Retailing Businesses.

INDICATORS OF CHAPTER 12 CONTENT

Outcomes concern:

1. the three forms of business ownership
2. advantages and disadvantages of each of the three major forms of business ownership
3. what is necessary to create a corporation
4. par value
5. franchise
6. services that a franchisee may expect from a franchisor

Chapter Subheads

Individual Proprietorship
Partnership
Corporation
Franchised Business

Illustrations include charts that show the advantages and disadvantages of each type of business.

Instructional Planner for Chapter 13, Business Locations

Chapter 13 addresses the following element:

(m) Retail Merchandising
    (4) Selling
        (A) distinguish between convenience, shopping, and specialty goods

Comments: This is the fifth chapter in Unit 2, Retailing Businesses.

INDICATORS OF CHAPTER 13 CONTENT

Outcomes concern:

1. three steps that must be taken in choosing an effective store location
2. why a retailer selecting a location would want information on population, economy, competition, and local laws of a community
3. several sources for obtaining information about a certain community or trading area
4. six types of shopping districts and what types of goods each would likely carry
5. three types of planned shopping centers
6. how the type of customer traffic should affect selection of a store site

Chapter Subheads

Choosing a Community
- Community Population Trends
- Community Economy
- Retail Competition
- Community Services and Laws

Choosing the Shopping District
- Central Shopping Districts
- Fringes of Central Shopping District
- Secondary Shopping District
- Planned Shopping Centers
- String Streets
- Neighborhood Shopping Districts

Choosing a Site
- Types of Goods Sold
- Customer Traffic

Illustrations show United States population, income by U.S. household for 1983, and store sites within a community.

Instructional Planner for Chapter 14, Obtaining Business Space

Note: The advisory committee did not identify any essential elements covered by this chapter, but it is recommended and *is* in the suggested scope and sequence.

Comments: This is the sixth chapter in Unit 2, Retailing Businesses.

INDICATORS OF CHAPTER 14 CONTENT

Outcomes concern:

1. key items for consideration when buying an existing building
2. advantages and disadvantages of store building ownership
3. checklist for evaluating a building for possible use as a retail store
4. relative merits of renting or leasing a store building
5. the three basic forms of leases
6. major precautions that should be observed when signing a building lease

Chapter Subheads

Buying an Existing Business
Buying a Building
Evaluating a Building
Renting a Building
Leasing a Building
- Lease Agreements
- Shopping Center Leases
- Precautions in Leasing

Illustrations include a table showing business space evaluation and a sample lease.

Instructional Planner for Chapter 15, Special Retail Businesses

Chapter 15 addresses the following essential elements:

(m) Retail Merchandising
- (1) Retailing
  - (C) explore the retailing careers available
- (2) Economics and marketing
  - (A) recognize the role of the consumer in retailing
  - (B) determine the kinds of consumer information needed by retailers

Comments: This is the seventh and last chapter in Unit 2, Retailing Businesses. It includes "Top Twenty Terms" and other material that covers the entire unit.

INDICATORS OF CHAPTER 15 CONTENT

Outcomes concern:

1. services provided by a franchisor
2. items included in a well-drawn franchise contract
3. primary service retailing
4. three reasons for the growth in service businesses
5. features of primary service businesses
6. two main types of nonstore retailing

Chapter Subheads

Franchised Businesses
- Structure of a Franchised Business
- Franchise Contracts

Service Businesses
- Features of Service Businesses
- Growth of Services
- Organization and Policies

Nonstore Retailing
- In-Home Selling
- Telephone Selling
- Catalog Retailing
- Mail-Order Selling
- Vending Machines

Instructional Planner for Chapter 16, Personnel Policies

Chapter 16 addresses the following essential element:

(m) Retail Merchandising
    (6) Store operation
        (B) explain the importance of store policies

Comments: This is the first chapter in Unit 3, Personnel.

INDICATORS OF CHAPTER 16 CONTENT

Outcomes concern:

1. compensation plans that are used in retailing
2. five fringe benefits available to retail employees
3. two procedures used to conduct employee evaluations
4. the value of a flexible work schedule
5. job promotions versus transfers
6. effect of the National Labor Relations Act on certain employer activities
7. three ways to maintain effective communication between employees and management

Chapter Subheads

Compensation Policy and Plans
- Straight Salary Plan
- Salary and Commission Plan
- Quota Plan
- Straight Commission Plan
- Special Incentive Plans

Employee Benefits Policy
Employee Evaluation Policy
Work Schedule Policy
Relocation Policy
Labor Relations Policy
Communication Policy

Illustrations include a sample form for employee performance appraisal and communication channels used by large retailers.

Instructional Planner for Chapter 17, Locating and Selecting Employees

Note: Chapter 17 does not directly cover any of the essential elements for this course; it covers more closely those for Marketing Education II and Entrepreneurship. However, it is recommended and *is* included in the suggested scope and sequence for Retail Merchandising.

Comments: This is the second chapter in Unit 3, Personnel.

INDICATORS OF CHAPTER 17 CONTENT

Outcomes concern:

1. two laws that affect the hiring of retail employees
2. sources that retailers use to find potential employees
3. the difference between a job analysis and a job description
4. why most employers require potential employees to complete an application form
5. information that should be contained in a personal data sheet
6. importance of a letter of application and how it should be written
7. purpose of an employment interview and how to prepare for, conduct, and close an interview
8. two benefits of formally introducing newly hired employees to their jobs

Chapter Subheads

Locating Potential Employees
Selecting Job Applicants

- Job Analysis
- Application Form
- Personal Data Sheet
- Application Letter
- Employment Interview
- Introducing New Employees

The chapter includes a sample application for employment, personal data sheet, and letter of application.

Instructional Planner for Chapter 18, Training Employees

Note: Chapter 18 does not directly cover any of the essential elements for this course; it covers more directly those for Marketing Education II and Entrepreneurship. Because it was *not* among the chapters recommended by the advisory committee for this course, information on it has been omitted.

Instructional Planner for Chapter 19, Working with Others

Note: Chapter 19 does not directly cover any of the essential elements for this course, but it is recommended and *is* included in the suggested scope and sequence.

Comments: This is the fourth chapter in Unit 3, Personnel.

INDICATORS OF CHAPTER 19 CONTENT

Outcomes concern:

1. why working effectively with others is an essential skill in retailing
2. human relations
3. personality
4. four positive attitudes
5. five ways an individual can contribute to teamwork
6. the difference between passive and active listening
7. five guidelines for developing active listening
8. three guidelines for both spoken and written messages

Chapter Subheads

Human Relations
- Basic Needs
- Personality
- Teamwork

Verbal Communication
- Listening
- Speaking
- Writing

Instructional Planner for Chapter 20, Effective Supervision

Note: Chapter 20 does not cover any of the essential elements for this course, and it is not recommended for use in the Retail Merchandising course. The material and elements it covers are more closely related to that covered in the Marketing Education II and Entrepreneurship courses. However, because it is the last chapter in Unit 3, Personnel, it contains useful material and activities that cover the entire unit.

Instructional Planner for Chapter 21, Planning and Budgeting

Chapter 21 addresses the following essential elements:

(m) Retail Merchandising
    (3) Merchandising
        (E) explain stock turnover
        (H) examine the elements and use of a merchandise plan

Comments: This is the first chapter in Unit 4, Merchandising.

INDICATORS OF CHAPTER 21 CONTENT

Outcomes concern:

1. the four steps in the merchandise planning process
2. the four levels of merchandise planning
3. top-down and bottom-up planning
4. the five main planning figures in a six-month merchandising budget
5. calculating stock turnover on a retail, cost, or unit basis
6. calculating planned planned purchases and open-to-buy
7. calculating planned markup to achieve a given profit goal

Chapter Subheads

Merchandising Organization
Merchandise Planning
- Levels and Types of Planning
- Setting Objectives

Merchandise Budget
- Planning Profit
- Planning Sales
- Planning Reductions
- Planning Stocks
- Planning Purchases
- Planning Expenses
- Planning Markup

Illustrations include a sample six-month merchandise plan.

Instructional Planner for Chapter 22, Product Lines/Assortments

Note: The advisory committee did not identify any essential elements covered by Chapter 22, but it is recommended and *is* included in the suggested scope and sequence.

Comments: This is the second chapter in Unit 4, Merchandising.

INDICATORS OF CHAPTER 22 CONTENT

Outcomes concern:

1. techniques a retailer can use to determine what items customers are likely to buy
2. the difference between national and private brands, and the advantages to retailers of each
3. shopping goods and the difference between standardized and nonstandardized goods
4. style, fashion, and fad, and why retailers must clearly understand each
5. the steps in a fashion cycle
6. important merchandise assortment considerations that every retailer should understand
7. the assortment planning tools that are commonly used in retailing

Chapter Subheads

Analyzing Customer Needs
- Analyzing Past Records
- Want Slips
- Comparison Shopping

Staple Goods
- Brand Name Staples
- Generic Brands

Shopping Goods
Fashion Goods
- Studying Fashion
- Language of Fashion
- The Fashion Cycle

Assortment Considerations
Assortment Planning Tools
- Basic Stock List
- Model Stock Plan
- Never-Out List

Illustrations include a sample want slip and a model stock plan.

Instructional Planner for Chapter 23, Selecting and Buying Merchandise

Chapter 23 addresses the following essential element:

(m) Retail Merchandising
    (3) Merchandising
        (H) examine the elements and use of a buying plan

Comments: This is the third chapter in Unit 4, Merchandising.

INDICATORS OF CHAPTER 23 CONTENT

Outcomes concern:

1. five sources of market information
2. five merchandise selection factors in a buying plan
3. two means of buying goods in store
4. how cooperative buying arrangements serve stores
5. four means of buying goods in the market
6. factors important in selecting merchandise sources
7. how to set up a resource file

Chapter Subheads

Obtaining Market Information
- Supplier Representatives
- Market Centers
- Trade Shows
- Trade Papers
- Trade Services

Buying Plan
In-the-Store Buying Methods
- Buying from Sales Representatives
- Cooperative Buying Arrangements

In-the-Market Buying Methods
- Market Trips
- Resident Buying Offices
- Group Buying

Central Buying
- Central Merchandising
- Listing System
- Central Warehousing or Requisitioning

Selecting Resources
Preparing a Resource File
Evaluating Merchandise Offerings

Instructional Planner for Chapter 24, Negotiations with Suppliers

Chapter 24 addresses the following essential element:

(m) Retail Merchandising
    (3) Merchandising
        (G) understand the basic calculations related to retailing

Comments: This is the fourth chapter in Unit 4, Merchandising.

INDICATORS OF CHAPTER 24 CONTENT

Outcomes concern:

1. three ways to estimate prices of merchandise
2. five forms of discounts that may be allowed by vendors
3. the purpose of each of the five forms of discounts
4. common billing and shipping terms
5. special services that may be available from vendors
6. conditions that make a merchandise order a binding contract

Chapter Subheads

Estimating Prices of Goods
Discounts
- Quantity Discount
- Seasonal Discounts
- Trade Discount
- Cash Discount
- Anticipation Discount

Terms of Sale
- Billing
- Shipping

Special Services
- Promotional Aids
- Packaging and Ticketing
- Merchandise Deals

Ordering
- Preparing the Order
- Confirming the Order

Instructional Planner for Chapter 25, Markups and Markdowns

Chapter 25 addresses the following essential element:

(m) Retail Merchandising
    (3) Merchandising
        (G) understand the basic calculations related to retailing

Comments: This is the fifth chapter in Unit 4, Merchandising.

INDICATORS OF CHAPTER 25 CONTENT

Outcomes concern:

1. major elements in the markup equation
2. calculating markup, retail, and cost when any two of these figures are given
3. the difference between initial markup percentage and maintained markup percentage
4. figures necessary to plan desired markup
5. calculating markdown percentage when dollar markdown and total sales are given
6. the two major purposes of markdowns
7. the five main reasons markdowns are necessary
8. two general plans that stores may follow in their timing of markdowns

Chapter Subheads

The Markup Equation
Initial and Maintained Markups
- Determining Initial Markup
- Determining Maintained Markup

Markdowns
Reasons for Markdowns
- Buying Errors
- Pricing Errors
- Selling Errors
- Poor Inventory Control
- Policy Reasons

Markdown Policies
- Timing of Markdowns
- Amount of Markdown

Illustrations include a table showing the common mathematical formulas used by retailers to set prices.

Instructional Planner for Chapter 26, Pricing Merchandise

Chapter 26 addresses the following essential element:

(m) Retail Merchandising
    (3) Merchandising
        (G) understand the basic calculations related to retailing

Comments: This is the sixth and last chapter in Unit 4, Merchandising. It includes "Top Twenty Terms" and other material that covers the entire unit.

INDICATORS OF CHAPTER 26 CONTENT

Outcomes concern:

1. the relationship of cost and expenses to pricing
2. the three categories of expenses to be considered in pricing merchandise, and examples of each
3. two demand factors in pricing
4. why there might be a variation in markup on items carried in the same department of a store
5. when a lower- or higher-than-average markup might be justified
6. the relationship of a store's sales policy to how it prices merchandise
7. why price adjustments should be recorded

Chapter Subheads

Cost and Expense Prices in Pricing
Demand Factors in Pricing
- Knowing the Customer
- Studying the Competition

Variations in Markups
- Higher-than-average Markup
- Lower-than-average Markup

Sales Policy and Pricing
- Sales of Regular Goods
- Special Purchase Goods
- Leader Merchandising
- Premium Merchandising

Tracking Price Adjustments

Instructional Planner for Chapter 27, Selecting Goods for Promotion

Chapter 27 addresses the following essential element:

(m) Retail Merchandising
    (5) Promotion
        (A) understand that advertising, display, and personal selling are the principal forms of promotion

Comments: This is the first chapter in Unit 5, Promotion.

INDICATORS OF CHAPTER 27 CONTENT

Outcomes concern:

1. promotional advertising and institutional advertising
2. the objectives of retail advertising
3. key considerations in retail promotion
4. seven factors affecting merchandise selected for advertising
5. the types of merchandise that should not be advertised

Chapter Subheads

Objectives of Advertising
Selecting Merchandise to Be Advertised
- Current Demand
- Fashion
- Exclusiveness
- Special Events
- Price
- Single and Multiple Promotions
- Private Brands

Merchandise That Should Not Be Advertised

Instructional Planner for Chapter 28, Advertising Media

Chapter 28 addresses the following essential element:

(m) Retail Merchandising
    (5) Promotion
        (B) recognize the commonly used media for retail advertising

Comments: This is the second chapter in Unit 5, Promotion.

INDICATORS OF CHAPTER 28 CONTENT

Outcomes concern:

1. defining *medium*
2. defining advertising media, coding, and market segmentation
3. the various kinds of printed media
4. computing the milline rate in a given situation
5. the major types of electronic media
6. the relative advantages and disadvantages of radio and television advertising
7. six types of supplementary media
8. program sponsorship versus publicity

Chapter Subheads

Communicating Through Advertising Media
Printed Media
- Newspapers
- Magazines
- Direct Mail
- Catalogs

Electronic Media
- Radio
- Television

Supplementary Media
Program Sponsorship
Publicity

Instructional Planner for Chapter 29, Preparing Advertisements

Chapter 29 addresses the following essential element:

(m) Retail Merchandising
    (5) Promotion
        (C) understand the basic elements of newspaper advertising

Comments: This is the third chapter in Unit 5, Promotion.

INDICATORS OF CHAPTER 29 CONTENT

Outcomes concern:

1. how advertisements are initiated in large and small stores
2. the three psychological levels of an individual's action
3. the four psychological steps brought on by good advertisements
4. the major elements of a printed or electronic advertisement
5. signature plate (logotype), layout, and dummy layout
6. creating and evaluating an effective advertising layout
7. three sources of help for advertisers

Chapter Subheads

Requirements of Successful Advertisements
- Attracting Attention
- Developing Interest
- Creating Desire
- Inducing Favorable Action

Elements of a Printed Advertisement
- Headline
- Illustration
- Copy
- Signature Plate
- Price

Combining the Elements
Elements of Electronic Advertisements
Help for Advertisers

Illustrations include the rules for writing headlines and copy, and a sample script for a television advertisement.

Instructional Planner for Chapter 30, Advertising Strategies

Chapter 30 addresses the following essential element:

(m) Retail Merchandising
    (5) Promotion
        (D) understand promotional mix

Comments: This is the fourth chapter in Unit 5, Promotion.

INDICATORS OF CHAPTER 30 CONTENT

Outcomes concern:

1. eight factors that influence how much a retailer might spend on advertising
2. three methods of planning an advertising budget
3. cooperative advertising
4. three possible problems of cooperative advertising
5. how advertising results may be measured
6. the importance of advertising and how it serves consumers
7. bait and switch
8. how governmental agencies affect advertising

Chapter Subheads

Planning an Advertising Budget
- Factors to Be Considered
- Methods of Planning
- Cooperative Advertising

Evaluating Results of Advertising
Meeting Advertising Standards

Instructional Planner for Chapter 31, Retail Store Displays

Chapter 31 addresses the following essential element:

(m) Retail Merchandising
  (5) Promotion
    (E) understand principles of display

Comments: This is the fifth chapter in Unit 5, Promotion

INDICATORS OF CHAPTER 31 CONTENT

Outcomes concern:

1. the purpose for which window displays are designed
2. the three kinds of window display units
3. five ways in which window display units can be used
4. five purposes of interior displays
5. the two major types of interior displays
6. the six basic kinds of interior displays
7. the five basic types of display arrangements
8. what is required for a display to be judged a success

Chapter Subheads

Window Displays
- Window Display Unit Designs
- Window Display Uses

Interior Displays
- Interior Display Unit Designs
- Kinds of Interior Displays
- Point-of-Purchase
- Interior Display Uses

Basic Display Arrangements
- Repetition
- Step
- Zigzag
- Pyramid
- Radiation

Requirements for Successful Displays

Instructional Planner for Chapter 32, Designing Displays

Chapter 32 addresses the following essential element:

(m) Retail Merchandising
    (5) Promotion
        (E) understand principles of display

Comments: This is the sixth chapter in Unit 5, Promotion.

INDICATORS OF CHAPTER 32 CONTENT

Outcomes concern:

1. the elements of display design
2. the effect of color on customer buying decisions
3. the difference between complementary colors and adjacent colors
4. the principles of display design
5. four sources of display ideas
6. small and large store procedures in selecting merchandise for display
7. three appeals that should be considered when selecting merchandise for display

Chapter Subheads

Elements of Display Design
- Line
- Shape
- Size
- Texture
- Color
- Weight

Principles of Display Design
- Harmony
- Contrast
- Emphasis
- Balance
- Proportion

Sources of Display Ideas
- Merchandise
- Printed Materials
- Other Merchant Displays
- Customers

Selecting Merchandise for Display
- Merchandise with Sales Appeal
- Merchandise with Eye Appeal
- Merchandise with Time Appeal

Instructional Planner for Chapter 33, Installing Displays

Chapter 33 addresses the following essential element:

(m) Retail Merchandising
    (5) Promotion
        (E) understand principles of display

Comments: This is the seventh and last chapter in Unit 5, Promotion, and includes material that covers the entire unit.

INDICATORS OF CHAPTER 33 CONTENT

Outcomes concern:

1. the six most important objectives of display
2. five merchandise aids that affect the visual impression given by a store
3. five steps involved in planning and setting up a display
4. display requisition, display planning calendar, display planning budget, functional prop, and decorative prop
5. ten guidelines for installing a display
6. five factors that should be considered when evaluating a completed display
7. the difference between promotional displays and institutional displays

Chapter Subheads

Display Requirements
Requesting Displays
Planning Displays
Preparing the Display Area
Setting Up Displays
Evaluating Displays
Organizing Display Activities

Instructional Planner for Chapter 34, Duties and Characteristics of Retail Sales Personnel

Chapter 34 addresses the following essential element:

(m) Retail Merchandising
  (6) Store Operation
    (B) explain the importance of store policies

Comments: This is the first chapter in Unit 6, Selling.

INDICATORS OF CHAPTER 34 CONTENT

Outcomes concern:

1. a major responsibility of most store employees
2. the importance of stockkeeping in making a favorable first impression on customers
3. three housekeeping tasks that are usually performed in a retail store
4. ten ways to prevent waste and loss
5. the importance of being courteous and accurate when giving customers directions or handling complaints
6. store policies and the importance of these policies to the customers, employees, and store management
7. four key salesperson characteristics
8. the importance of a proper selling attitude and how it can be developed

Chapter Subheads

Nonselling Duties
- Stockkeeping
- Housekeeping
- Preventing Waste and Loss
- Directing Customers
- Handling Complaints
- Carrying Out Store Policies

Salesperson Characteristics
- Personal Habits
- Mental Skills
- Business Ethics
- Human Relations Skills
- Proper Selling Attitude

Instructional Planner for Chapter 35, Customer Buying Behavior

Chapter 35 addresses the following essential element:

(m) Retail Merchandising
    (4) Selling
        (E) recognize the importance of understanding consumer behavior

Comments: This is the second chapter in Unit 6, Selling.

INDICATORS OF CHAPTER 35 CONTENT

Outcomes concern:

1. two general reasons why customers buy
2. basic needs and how needs motivate
3. secondary wants and how wants motivate
4. five rational buying motives
5. five emotional buying motives
6. the difference between convenience, shopping, and specialty goods
7. how timing can affect a customer's decision to buy
8. store personality
9. six customer personality types and how each should be handled

Chapter Subheads

Why People Buy
Buying Motives
- Basic Needs Motives
- Secondary Wants Motives

What People Buy
When People Buy
Customer Store Personalities
- Undecided Customers
- Just-Looking Customers
- Silent Customers
- Know-It-All Customers
- Deliberate Customers
- Friendly Customers

Instructional Planner for Chapter 36, The Sales Presentation

Chapter addresses the following essential elements:

(m) Retail Merchandising
  (4) Selling
    (C) distinguish between personal and nonpersonal selling
    (D) identify steps of personal selling

Comments: This is the third chapter in Unit 6, Selling.

INDICATORS OF CHAPTER 36 CONTENT

Outcomes concern:

1. the importance of personal selling skills as a retail function
2. the difference between nonpersonal and personal selling
3. the essentials of a sales presentation
4. the eight steps of the selling process
5. the purpose of the preapproach
6. the four approach categories
7. how listening, questioning, and observation skills can help the salesperson determine customer wants and needs
8. four demonstration techniques
9. the purpose of the presentation

Chapter Subheads

What Is Personal Selling?
Essentials of a Good Sales Presentation
- A Complete Presentation
- A Clear Presentation
- A Confidence-Building Presentation
- A Logical Presentation

Assisting Customers
- The Preapproach
- The Approach
- Determining Customer Needs and Wants

Demonstrating and Presenting Merchandise
- Demonstration Techniques
- Presentation Techniques

Instructional Planner for Chapter 37, Closing the Sale

Chapter 37 addresses the following essential element:

(m) Retail Merchandising
    (4) Selling
        (D) identify the steps of personal selling

Comments: This is the fourth chapter in Unit 6, Selling.

INDICATORS OF CHAPTER 36 CONTENT

Outcomes concern:

1. the four basic kinds of objections and why customers raise them
2. how objections can be forestalled
3. five techniques to use to answer questions
4. three ways salespersons can prepare to answer objections
5. the natural process for closing a sale
6. trial close
7. five closing techniques
8. the ABC's of selling
9. suggestion selling

Chapter Subheads

Answering Objections
- Direct Denial
- Yes-But
- Reverse English
- Superior Point
- Questioning
- Preparing to Overcome Objections

Closing Techniques
- Which Close
- Related-Merchandise Close
- SRO Close
- Service Close
- Asking for the Sale

Timing the Close
Suggestion Selling

Instructional Planner for Chapter 38, Completing the Sales Transaction

Chapter 38 addresses the following essential element:

(m) Retail Merchandising
    (6) Store operation
        (D) identify areas of retail merchandising where computer technology is used

Comments: This is the fifth chapter in Unit 6, Selling.

INDICATORS OF CHAPTER 38 CONTENT

Outcomes concern:

1. the activities that make up a sales transaction
2. three important sales transaction functions performed on sales registers
3. two functions performed by computer-assisted sales registers
4. seven of the most common errors in operating a sales register
5. procedures to follow when making change for a cash sale
6. two means of authorizing customer credit when the floor limit is exceeded
7. the typical procedure retail stores follow for credit card purchases
8. salesperson's responsibility when wrapping customer merchandise for taking, delivering, or mailing
9. why a customer's departure is considered part of the sales transaction

Chapter Subheads

Sales Registers
- Computer-Assisted Sales Registers
- Sales Register Operators

Cash Transactions
- Cash Sale Procedures
- Making Change

Charge Transactions
Wrapping Merchandise
Preparing Merchandise for Delivery or Mailing
Customer Departure

Instructional Planner for Chapter 39, Special Skills in Selling

Chapter 39 addresses the following essential element:

(m) Retail Merchandising
    (3) Merchandising
        (D) learn ways to prevent shortage, theft, damage, and theft of merchandise

Comments: This is the sixth and last chapter in Unit 6, Selling, and it includes material that covers the entire unit.

INDICATORS OF CHAPTER 39 CONTENT

Outcomes concern:

1. five suggestions for remembering names
2. four techniques to help a customer visualize a service
3. how to serve more than one customer at a time
4. the attitude a salesperson should demonstrate when handling customer complaints
5. three major kinds of complaints
6. four factors that influence the adjustment a store will make
7. the best policy for apprehending shoplifters
8. five kinds of information needed when taking an order by telephone
9. characteristics of salespersons who are most successful in telephone selling
10. in-home parties for selling, and factors to be considered in a home-selling situation

Chapter Subheads

Remembering Names
Selling Services
Serving More than One Customer at a Time
Handling Complaints
- Maintaining the Proper Attitude Toward Complaints
- Kinds of Complaints
- Determining the Facts
- Making an Adjustment

Reducing Shoplifting and Theft
Telephone Selling and Orders
- Telephone Selling
- Telephone Orders

Serving Customers Out of the Store

Instructional Planner for Chapter 40, Store Layout and Maintenance

Chapter 40 addresses the following essential elements:

(m) Retail Merchandising
    (3) Merchandising
        (C) recognize the need for general safety practices
    (6) Store operation
        (A) understand the need for store security

Comments: This is the first chapter in Unit 7, Operations.

INDICATORS OF CHAPTER 40 CONTENT

Outcomes concern:

1. retail activities of the operating division of a store
2. how store design affects store image
3. why different parts of a store have different potential for sales
4. appropriate layouts for feature, impulse, and staple goods
5. ten points to consider when planning store layout
6. five types of store lighting systems
7. activities necessary to good store maintenance

Chapter Subheads

Store Design
Store Layout
- Merchandise Arrangements
- Merchandise Attractiveness
- Related-Merchandise Lines
- Arrangement of Selling Area

Lighting
- Types of Lamps
- Types of Lighting Systems

Flexibility in Layout and Lighting
Store Maintenance
- Housekeeping
- Supplies and Equipment
- Store Security

Instructional Planner for Chapter 41, Service Policies

Chapter 41 addresses the following essential element:

(m) Retail Merchandising
    (6) Store operation
        (B) explore the importance of store policies

Comments: This is the second chapter in Unit 7, Operations

INDICATORS OF CHAPTER 41 CONTENT

Outcomes concern:

1. the four major categories of store services
2. five selling and shopping services
3. personal shopping services
4. five different delivery policies
5. convenience services
6. two kinds of profit services
7. the purpose of a store's community service activities

Chapter Subheads

Service Policies
Selling and Shopping Services
- Personal Selling and Self-Services
- Shopping Services
- Wrapping or Bagging
- Returns and Adjustments
- Delivery Services
- Alterations

Convenience Services
- In-Store Services

Profit Services
Community Services
Customer Relations

Instructional Planner for Chapter 42, Credit and Collection Policy

Chapter 42 addresses the following essential element:

(m) Retail Merchandising
    (6) Store operation
        (C) understand why retailers offer credit

Comments: This is the third chapter in Unit 7, Operations.

INDICATORS OF CHAPTER 42 CONTENT

Outcomes concern:

1. the three basic types of retail credit plans
2. how retail stores use bank credit card plans
3. the three Cs of credit granting
4. credit-scoring procedure
5. the features of a good credit collection procedure
6. legal actions a retailer may taken when a customer fails to pay a credit obligation
7. four measures for determining effectiveness of a collection policy

Chapter Subheads

Retail Credit Plans
- Open, or Regular, Credit Account
- Deferred, or Revolving, Credit Account
- Installment Plan
- Layaway Plan

Outside Financing of Retail Credit
- Bank Credit Plan
- Factoring
- Bank Credit Card Plans
- Other Credit Card Plans
- Abuse of Credit Cards

Granting Credit
- Character
- Capacity
- Capital

Credit Scoring

Collection Procedures
- Follow-Up Plans
- Classifying Delinquent Accounts
- Communicating with Delinquent Account Customers
- Legal Action

Effectiveness of Collection Policies

Illustrations include a sample charge account agreement and performance measures for debt collection.

Instructional Planner for Chapter 43, Handling Incoming Merchandise

Chapter 43 addresses the following essential element:

(m) Retail Merchandising
  (3) Merchandising
    (A) determine the importance of accuracy and efficiency in receiving, checking, and marking merchandise

Comments: This is the fourth chapter in Unit 7, Operations.

INDICATORS OF CHAPTER 43 CONTENT

Outcomes concern:

1. how to achieve efficiency in handling incoming merchandise
2. activities that take place when merchandise arrives at the receiving point of a retail store
3. the kinds of receiving records and identification procedures followed when processing newly arrived merchandise
4. the five basic steps in checking merchandise
5. methods commonly used to check merchandise quantity
6. steps used to check merchandise quality
7. steps to follow when handling returns and claims against vendors

Chapter Subheads

Efficiency in Receiving Merchandise
Receiving Point
Receiving Records and Identification
Checking Merchandise
Layout of Receiving Area
Quantity Check
- Direct-Check Method
- Blind-Check Method
- Choosing the Checking Method

Quality Check
Returns and Claims Against Vendors

Illustrations include a completed receiving record, a sample apron, and a sample invoice.

Instructional Planner for Chapter 44, Marking and Stocking Merchandise

Chapter 44 addresses the following essential element:

(m) Retail Merchandising
  (3) Merchandising
    (A) determine the importance of accuracy and efficiency in receiving, checking, and marking merchandise

Comments: This is the fifth chapter in Unit 7, Operations.

INDICATORS OF CHAPTER 44 CONTENT

Outcomes concern:

1. requirements of a good marking system
2. five standard marking procedures
3. use of a Universal Product Code (UPC) as a marking
4. six items of information that may appear on a price ticket
5. a variety of price tickets used to mark merchandise
6. unit pricing, cost codes, and merchandise dating
7. the three main reasons for arranging stock

Chapter Subheads

Marking Merchandise
  - Hand Marking
  - Preretailing
  - Premarking
  - Remarking
  - Nonmarking

Price Tickets
  - Kinds of Price Tickets
  - Unit Pricing
  - Cost Codes
  - Merchandise Dating

Arranging Stock
  - To Aid in Selling
  - To Aid New Salespeople
  - To Aid Stock Control

Illustrations include the most frequently used price tickets.

Instructional Planner for Chapter 45, Stock Management and Control

Chapter 45 addresses the following essential elements:

(m) Retail Merchandising
  (3) Merchandising
    (B) understand the importance of stockkeeping, handling, and caring for stock
    (D) learn ways to prevent shortage, damage, and theft of merchandise

Comments: This is the sixth and last chapter in Unit 7, Operations, and contains material that covers the entire unit.

INDICATORS OF CHAPTER 45 CONTENT

Outcomes concern:

1. laying out an efficient stockroom for a retail store
2. selecting the appropriate method of stock control for a store
3. establishing and using a checklist system
4. maintaining a simple perpetual inventory system
5. identifying slow-selling merchandise and recommending means for controlling such merchandise
6. measures for protecting stock from shoplifting and employee theft

Chapter Subheads

Stock Reserves
- Forward Stock
- Reserve Stock

Methods of Stock Control
- Dollar-Control Method
- Unit-Control Method

Kinds of Unit Stock Control System
- Checklist System
- Unit Sales Analysis
- Perpetual Inventory System
- Warehouse Control System

Slow-Selling Merchandise

Stock Security
- Protective Measures
- Employee Theft

Instructional Planner for Chapter 46, Financing a Business

Note: The advisory committee did not identify any essential elements covered by Chapter 46, but it is recommended and *is* included in the suggested scope and sequence.

Comments: This is the first chapter in Unit 8, Control.

INDICATORS OF CHAPTER 46 CONTENT

Outcomes concern:

1. the difference between fixed and working capital
2. why fixed capital should be kept at a minimum in relation to working capital
3. three ways a person may become an owner of a retail business
4. the three classifications of building equipment
5. kinds of information that lending agencies want when considering granting a loan
6. the major sources of capital available to most store owners

Chapter Subheads

Determining Capital Needs
Sources of Capital
- Personal Savings
- Banks and Loan Associations
- Partnership
- Corporate Financing
- Trade Credit

Obtaining Capital Funds
Distribution of Capital
- Fixed Capital
- Working Capital
- Reserve Capital

Instructional Planner for Chapter 47, Merchandise Records

Chapter 47 addresses the following essential element:

(m) Retail Merchandising
    (3) Merchandising
        (F) explain inventory control systems

Comments: This is the second chapter in Unit 8, Control.

INDICATORS OF CHAPTER 47 CONTENT

Outcomes concern:

1. the records necessary to maintain control over purchases
2. the purpose of good merchandise purchase and inventory records
3. information contained in a purchase order file
4. the flow of a vendor's invoice from point of receipt to payment
5. the procedure necessary to take a physical inventory
6. calculating book or perpetual inventory
7. calculating the cost of an inventory

Chapter Subheads

Purchase Records
- Purchase Order
- Invoice

Inventory Records
- Physical Inventory
- Book or Perpetual Inventory

Inventory at Current Market Value

Illustrations include the flow of an invoice from receipt to payment and the major reasons for shortages.

Instructional Planner for Chapter 48, Sales and Expense Records

Note: The advisory committee did not identify any essential elements covered by Chapter 48, but it is recommended and *is* in the suggested scope and sequence.

Comments: This is the third chapter in Unit 8, Control.

INDICATORS OF CHAPTER 48 CONTENT

Outcomes concern:

1. the purpose of a cash fund
2. how sales registers are used for recording daily sales
3. setting up and accurately completing a proof of cash
4. classifying expenses in natural expense categories
5. identifying and calculating direct and indirect expenses
6. the procedure to establish and maintain a petty cash fund
7. prepaid and accrued expenses

Chapter Subheads

Sales Records
- Recording Cash Sales
- Recording Credit Sales
- Determining Total Sales
- Collecting Sales Data

Expense Records
- Classifying Expenses
- Analyzing Expense Records
- Mishandled Expense Records

Illustrations include a proof of cash procedure and a petty cash record.

Instructional Planner for Chapter 49, Tax Expense Records and Financial Statements

Note: The advisory committee did not identify any essential elements covered by Chapter 49, but it is recommended and *is* listed in the suggested scope and sequence.

Comments: This is the fourth chapter in Unit 8, Control.

INDICATORS OF CHAPTER 49 CONTENT

Outcomes concern:

1. the five most common taxes paid by retailers
2. data and calculations necessary to prepare an income statement
3. three ways to increase net income
4. calculating net profit and pure profit for a small business
5. data and calculations necessary to prepare a balance sheet
6. why a retailer should have a records retention schedule

Chapter Subheads

Taxes
- Income Taxes
- Property Taxes
- Sales Taxes
- Payroll Taxes
- Special Taxes

Financial Statements
- The Income Statement
- The Balance Sheet

Retaining Records

Illustrations include the income statement of a small business and a balance sheet for a small business.

Instructional Planner for Chapter 50, Retail Information Systems

Chapter 50 addresses the following essential element:

(m) Retail Merchandising
    (6) Store operation
        (D) identify areas of retail merchandising where computer technology is used

Comments: This is the fifth and last chapter in Unit 8, Control, and contains material that covers the entire unit.

INDICATORS OF CHAPTER 50 CONTENT

Outcomes concern:

1. the four steps necessary in processing retail reports
2. the two kinds of data recorded in a retail transaction
3. three ways of recording retail transactions
4. five reports prepared from repetitive retail transactions
5. five major applications of computers to retailing
6. how retail forecasting is aided by a retail information system

Chapter Subheads

Planning the Information System
Transaction Data
Recording Transactions
- Manual Recording
- Mechanical Recording
- Electronic Recording

Kinds of Retail Reports
- Sales Audit
- Accounts Receivable
- Inventory Control
- Personnel Performance
- Payroll

Special Information Systems
- Retailer-Wholesaler Programs
- Electronic Ordering
- Credit and Check Authorization
- Mail Orders
- Forecasting

Illustrations include a sales and inventory report.

Instructional Planner for Chapter 51, Research in Retailing

Chapter 51 addresses the following essential elements:

(m) Retail Merchandising
    (2) Economics and marketing
        (B) determine the kinds of consumer information needed by retailers
        (F) recognize how market research is used by retailers

Comments: This is the first chapter in Unit 9, Future of Retailing.

INDICATORS OF CHAPTER 51 CONTENT

Outcomes concern:

1. retailing research
2. seven ways to use retailing research to solve store problems
3. steps in the retailing research procedure
4. six sources of secondary information
5. three methods of gathering primary information
6. importance of research skills for a career in retailing

Chapter Subheads

How Retailers Use Retailing Research
- Store Location
- Customers Needs and Wants
- Sales
- Advertising and Display
- Personnel
- Operations
- Information Systems

Research Procedures
- Identifying the Problem
- Organizing the Study
- Collecting Data
- Organizing the Data
- Analyzing and Presenting the Data
- Making a Decision

Importance of Research Skills

Instructional Planner for Chapter 52, Technological Advances in Retailing

Chapter 52 addresses the following essential elements:

(m) Retail Merchandising
    (1) Retailing
        (D) explore trends in retailing
    (6) Store operation
        (D) identify areas of retail merchandising where computer technology is used

Comments: This is the second chapter in Unit 9, Future of Retailing.

INDICATORS OF CHAPTER 52 CONTENT

Outcomes concern:

1. a key factor in bringing about technical changes in retailing
2. three reasons retailers are seeking new ways to reach consumers
3. three examples of in-store merchandising technology
4. kiosks and how they are used for in-store retailing
5. how retailers use in-home technology to sell merchandise
6. EFTS and three ways it can be used in retailing
7. two new areas where retailers use computer technology to make management decisions

Chapter Subheads

Technology in Merchandising
- In-Store Technology
- In-Home Technology

Technology in Customer Services
Technology in Management Decision-Making

Instructional Planner for Chapter 53, Changing Practices in Retailing

Chapter 53 addresses the following essential element:

(m) Retail Merchandising
  (1) Retailing
    (D) explore trends in retailing

Comments: This is the third chapter in Unit 9, Future of Retailing.

INDICATORS OF CHAPTER 53 CONTENT

Outcomes concern:

1. how shopping for staple goods and specialty goods is changing
2. five kinds of innovative shopping malls
3. where and why multiuse malls have grown
4. how manufacturer involvement in retailing has changed
5. how megamalls differ from other kinds of shopping malls
6. the superstore concept and examples of no-frills retailers
7. main reasons international retailing has been sucessful

Chapter Subheads

Shopping Malls
- Multi-Use Malls
- Podmalls
- High-Fashion Malls
- Manufacturers Malls
- Megamalls

Superstores
No-Frills Retailers
International Retailing

Instructional Planner for Chapter 54, Your Future in Retailing

Chapter 54 addresses the following essential element:

(m) Retail Merchandising
  (1) Retailing
    (C) explore the retailing careers available

Comments: This is the fourth chapter in Unit 9, Future of Retailing.

INDICATORS OF CHAPTER 54 CONTENT

Outcomes concern:

1. seven expectations potential employees may have about their jobs
2. four traits most retailers prefer in the people they employ
3. how interest and aptitude tests can help identify career choices
4. how individual values may influence job choice
5. four sources of job information
6. importance of an updated resume, and how it can be kept current
7. productivity and four ways to develop good work habits
8. time management and eight time management guidelines

Chapter Subheads

Setting Your Job Expectations
Sources of Job Information
- Friends and Acquaintances
- Help-Wanted Advertisements
- Employment Agencies
- Career Planning and Placement Offices

Elements of Job Performance
- Developing Work Habits
- Managing Time

Planning for Advancement

Instructional Planner for Chapter 55, Planning a Future in Retailing

Chapter 55 addresses the following essential element:

(m) Retail Merchandising
    (1) Retailing
        (C) explore the retailing careers available

Comments: This is the fifth and last chapter in Unit 9, Future of Retailing, and contains material related to the entire unit.

INDICATORS OF CHAPTER 55 CONTENT

Outcomes concern:

1. major factors in planning for a future in retailing
2. four qualities retail employees need for success, and their importance to advancement
3. a personal career plan
4. four phases of the career planning process
5. three ways in which additional retail training and education can be obtained
6. the entrepreneur
7. the main reason why new business owners often fail

Chapter Subheads

Performing on the Job
- Responsibility
- Loyalty
- Resourcefulness
- Initiative
- Merchandising Expertise

Personal Career Planning
- Continuous Planning
- Continuing Education
- Owning a Retail Business

Section Four

Essential Element Sheets for Retail Merchandising

- This section is for teachers who schedule instruction based on essential elements rather than chapters. It identifies content in the text that best addresses specific elements.
- Teachers who do their basic planning by chapters may also find it useful because it shows how each chapter addresses an element.
- A separate set of sheets is provided for each element and all of its subelements, because often they need to be analyzed together.
- Each sheet cites chapters and the objectives most closely related to the essential element.

Note: All sheets may be copied.

Essential Element (1) Retailing

Comment—(1)(A)(B)(C)(D) should be considered together in planning and presenting information. Chapters involved are 1, 2, 3, 4, 8, 9, 11, 15, 52, 53, 54, 55.

Resources for Content and Strategies

State-adopted Textbook, with support material:

(1) Samson and Little. SW-*Retail Merchandising: Consumer Goods and Services, 10th edition* Chapters that have content related to this essential element are those for which chapter outcomes are listed.

Subelement (A) understand the meaning of retailing and merchandising

Chapter 1, Retail Marketing

1. marketing, retailing, and retailers
2. the purpose of retailing
3. the value of retail marketing to consumers

Chapter 2, Organization

2. the differences between formal and informal organization
3. examples of activities performed in each of the four retail functions

Chapter 4, Merchandising

1. the four kinds of merchandise

Chapter 9, Production and Distribution of Merchandise

1. how the four merchandise utilities are created
3. four different channels of distribution

Subelement (B) understand the various types and kinds of retail establishments

Chapter 1, Retail Marketing

4. three types of retail marketing businesses

Chapter 4, Merchandising

1. the four kinds of merchandise

Chapter 11, Types of Retail Businesses

1. characteristics of a small store retail business
2. convenience goods versus shopping goods
3. five major types of large store businesses
4. characteristics of a department store
5. why low margin stores are able to offer goods at reduced prices

6. advantages of size to a large or small retail business

Subelement (C) explore the retailing careers available

Chapter 3, Personnel

1. potential for employment in the retailing field
2. basic retailing activities
3. major retail employers and the kinds of positions they offer
4. recruitment techniques retailers use to locate potential employees
5. selection and training procedures followed by retail employers
6. opportunities for advancement available in retailing

Chapter 15, Special Retail Businesses

1. services provided by a franchisor
3. primary service retailing
4. three reasons for the growth in service businesses
5. features of primary service businesses
6. two main types of nonstore retailing

Chapter 54, Your Future in Retailing

1. seven expectations potential employees may have about their jobs
2. four traits most retailers prefer in the people they employ
3. how interest and aptitude tests can help identify career choices
4. how individual values may influence job choice
5. four sources of job information
6. importance of an updated resume, and how it can be kept current

Chapter 55, Planning a Future in Retailing

1. major factors in planning for a future in retailing
2. four qualities retail employees need for success, and their importance to advancement
3. a personal career plan
4. four phases of the career planning process
5. three ways in which additional retail training and education can be obtained
6. the entrepreneur
7. the main reason why new business owners often fail

Subelement (D) explore trends in retailing

Chapter 8, Future of Retailing

1. forces that are affecting consumer lifestyles
2. three technological changes that will affect the future of retailing
3. typical retailing problems that retailing research can help solve
4. some general procedures that can be followed when conducting retailing research

Chapter 52, Technological Advances in Retailing

1. a key factor in bringing about technical changes in retailing
2. three reasons retailers are seeking new ways to reach consumers
3. three examples of in-store merchandising technology

4. kiosks and how they are used for in-store retailing
5. how retailers use in-home technology to sell merchandise
6. EFTS and three ways it can be used in retailing
7. two new areas where retailers use computer technology to make management decisions

Chapter 53, Changing Practices in Retailing

1. how shopping for staple goods and specialty goods is changing
2. five kinds of innovative shopping malls
3. where and why multiuse malls have grown
4. how manufacturer involvement in retailing has changed
5. how megamalls differ from other kinds of shopping malls
6. the superstore concept and examples of no-frills retailers
7. main reasons international retailing has been successful

Essential Element (2) Economics and Marketing

Comment—(2)(A)(B)(C)(D)(E) and (F) should be considered together in planning and presenting information. Chapters involved are 1, 8, 9, 10, 1, and 51.

Resources for Content and Strategies

State-adopted Textbook, with support material:

(1) Samson and Little. SW-*Retail Merchandising: Consumer Goods and Services, 10th edition* Chapters which have content related to this essential element are those for which chapter outcomes are listed below.

Subelement (A) recognize the role of the consumer in retailing

Chapter 1, Retail Marketing

3. the value of retail marketing to consumers

Chapter 10, Private Enterprise

2. the main difference between a directed economy and a free economy
3. major elements necessary for a private enterprise system
4. how competition serves as an invisible control of business
6. three kinds of consumer income and spending information that are helpful to retailers

Subelement (B) determine the kinds of consumer information needed by retailers

Chapter 8, Future of Retailing

1. forces that are affecting consumer lifestyles
2. three technological changes that will affect the future of retailing
3. typical retailing problems that retailing research can help solve
4. some general procedures that can be followed when conducting retailing research

Chapter 15, Special Retail Businesses

1. services provided by a franchisor
2. items included in a well-drawn franchise contract
3. primary service retailing
4. three reasons for the growth in service businesses
5. features of primary service businesses
6. two main types of nonstore retailing

Chapter 51, Research in Retailing

1. retailing research
2. seven ways to use retailing research to solve store problems
3. steps in the retailing research procedure
4. six sources of secondary information
5. three methods of gathering primary information
6. importance of research skills for a career in retailing

Subelement (C) understand the concept and need of a business producing a profit

Chapter 10, Private Enterprise

1. defining *economic system*
2. the main difference between a directed economy and a free economy
3. major elements necessary for a private enterprise system
4. how competition serves as an invisible control of business
5. relationship of gross national product, net national product, and national income
6. three kinds of consumer income and spending information that are helpful to retailers

Subelement (D) examine the role of retail merchandising in a free or private enterprise system

Chapter 9, Production and Distribution of Merchandise

1. how the four merchandise utilities are created
3. four different channels of distribution
5. two types of agent middlemen
6. physical distribution versus channels of distribution

Chapter 10, Private Enterprise

1. defining *economic system*
2. the main difference between a directed economy and a free economy
3. major elements necessary for a private enterprise system
4. how competition serves as an invisible control of business
5. relationship of gross national product, net national product, and national income
6. three kinds of consumer income and spending information that are helpful to retailers

Subelement (E) describe the characteristics of different kinds of business ownership

Chapter 12, Types of Business Ownership

1. the three forms of business ownership
2. advantages and disadvantages of each of the three major forms of business ownership
3. what is necessary to create a corporation
4. par value
5. franchise
6. services that a franchisee may expect from a franchiser

Subelement (F) recognize how market research is used by retailers

Chapter 8, Future of Retailing

1. forces that are affecting consumer lifestyles
2. three technological changes that will affect the future of retailing
3. typical retailing problems that retailing research can help solve
4. some general procedures that can be followed when conducting retailing research

Chapter 51, Research in Retailing

1. retailing research
2. seven ways to use retailing research to solve store problems
3. steps in the retailing research procedure
4. six sources of secondary information
5. three methods of gathering primary information
6. importance of research skills for a career in retailing

Essential Element (3) Merchandising

Comment—(3)(A)(B)(C)(D)(E)(F)(G) and (H) should be considered together in planning and presenting information. Chapters involved are 21, 23, 24, 25, 26, 39, 40, 43, 44, 45, and 47.

Resources for Content and Strategies

State-adopted Textbook, with support material:

(1) Samson and Little. SW-*Retail Merchandising: Consumer Goods and Services, 10th edition* Chapters which have content related to this essential element are those for which chapter outcomes are listed below.

Subelement (A) determine the importance of accuracy and efficiency in receiving, checking, and marking merchandise

Chapter 43, Handling Incoming Merchandise

1. how to achieve efficiency in handling incoming merchandise
2. activities that take place when merchandise arrives at the receiving point of a retail store
3. the kinds of receiving records and identification procedures followed when processing newly arrived merchandise
4. the five basic steps in checking merchandise
5. methods commonly used to check merchandise quantity
6. steps used to check merchandise quality
7. steps to follow when handling returns and claims against vendors

Chapter 44, Marking and Stocking Merchandise

1. requirements of a good marking system
2. five standard marking procedures
3. use of a Universal Product Code (UPC) as a marking
4. six items of information that may appear on a price ticket
5. a variety of price tickets used to mark merchandise
6. unit pricing, cost codes, and merchandise dating
7. the three main reasons for arranging stock

Subelement (B) understand the importance of stockkeeping, handling, and caring for stock

Chapter 45, Stock Management and Control

1. laying out an efficient stockroom for a retail store
2. selecting the appropriate method of stock control for a store
3. establishing and using a checklist system
4. maintaining a simple perpetual inventory system
5. identifying slow-selling merchandise and recommending means for controlling such merchandise
6. measures for protecting stock from shoplifting and employee theft

Subelement (C) recognize the need for general safety practices

(1) Samson and Little. SW-*Retail Merchandising: Consumer Goods and Services, 10th edition*

Even with the chapter listed, this subject may need supplementation by the teacher. For that reason, additional sources from EIMC-Educational Resources are listed at the end of this section.

Chapter 40, Store Layout and Maintenance

7. activities necessary to good store maintenance

Subelement (D) learn ways to prevent shortage, damage, and theft of merchandise

Chapter 39, Special Skills in Selling

7. the best policy for apprehending shoplifters

Chapter 45, Stock Management and Control

6. measures for protecting stock from shoplifting and employee theft

Subelement (E) explain stock turnover

Chapter 21, Planning and Budgeting

5. calculating stock turnover on a retail, cost, or unit basis

Subelement (F) explain inventory control systems

Chapter 47, Merchandise Records

1. the records necessary to maintain control over purchases
2. the purpose of good merchandise purchase and inventory records
3. the information contained on a purchase order file
4. the flow of a vendor's invoice from point of receipt to payment
5. the procedure necessary to take a physical inventory
6. calculating book or perpetual inventory
7. calculating the cost of an inventory

Subelement (G) understand the basic calculations related to retailing

Chapter 24, Negotiations with Suppliers

1. three ways to estimate prices of merchandise
2. five forms of discounts that may be allowed by vendors
3. the purpose of each of the five forms of discounts
4. common billing and shipping terms

Chapter 25, Markups and Markdowns

1. major elements in the markup equation
2. calculating markup, retail, and cost when any two of these figures are given
3. the difference between initial markup percentage and maintained markup percentage
4. figures necessary to plan desired markup

5. calculating markdown percentage when dollar markdown and total sales are given
6. the two major purposes of markdowns
7. the five main reasons markdowns are necessary
8. two general plans that stores may follow in their timing of markdowns

Chapter 26, Pricing Merchandise

1. the relationship of cost and expenses to pricing
2. the three categories of expenses to be considered in pricing merchandise, and examples of each

Subelement (H) examine the elements and use of a merchandise plan

Chapter 21, Planning and Budgeting

1. the four steps in the merchandise planning process
2. the four levels of merchandise planning
3. top-down and bottom-up planning
4. the five main planning figures in a six-month merchandising budget

Chapter 23, Selecting and Buying Merchandise

2. five merchandise selection factors in a buying plan

Essential Element (4) Selling

Comment—(4)(A)(B)(C)(D)(E) and (F) should be considered together in planning and presenting information. Chapters involved are 3, 5, 6, 8, 10, 11, 13, 35, 36, and 37.

Resources for Content and Strategies

State-adopted Textbook, with support material:

(1) Samson and Little. SW-*Retail Merchandising: Consumer Goods and Services, 10th edition*
Chapters which have content related to this essential element are those for which chapter outcomes are listed below.

Subelement (A) distinguish between convenience, shopping, and specialty goods

Chapter 11, Types of Retail Businesses

2. convenience goods versus shopping goods

Chapter 13, Business Locations

4. six types of shopping districts and what types of goods each would likely carry

Subelement (B) recognize need for knowledge of product or service being sold

Chapter 6, Selling

5. various special selling and support skills needed in a retail sales position

Subelement (C) distinguish between personal and nonpersonal selling

Chapter 36, The Sales Presentation

2. the difference between nonpersonal and personal selling

Subelement (D) identify the steps of personal selling

Chapter 6, Selling

5. various special selling and support skills needed in a retail sales position

Chapter 36, The Sales Presentation

1. the importance of personal selling skills as a retail function
3. the essentials of a sales presentation
4. the eight steps of the selling process
5. the purpose of the preapproach
6. the four approach categories
7. how listening, questioning, and observation skills can help the salesperson determine customer wants and needs
8. four demonstration techniques
9. the purpose of the presentation

Chapter 37, Closing the Sale

1. the four basic kinds of objections and why customers raise them
2. how objections can be forestalled
3. five techniques to use to answer questions
4. three ways salespersons can prepare to answer objections
5. the natural process for closing a sale
6. trial close
7. five closing techniques
8. the ABC's of selling
9. suggestion selling

Subelement (E) recognize the importance of understanding consumer behavior

Chapter 8, Future of Retailing

3. typical retailing problems that retailing research can help solve

Chapter 10, Private Enterprise

4. how competition serves as an invisible control of business
6. three kinds of consumer income and spending information that are helpful to retailers

Chapter 35, Customer Buying Behavior

1. two general reasons why customers buy
2. basic needs and how needs motivate
3. secondary wants and how wants motivate
4. five rational buying motives
5. five emotional buying motives
6. the difference between convenience, shopping, and specialty goods
7. how timing can affect a customer's decision to buy
8. store personality
9. six customer personality types and how each should be handled

Subelement (F) explore selling careers

Chapter 6, Selling

1. importance of selling in retailing
2. qualifications necessary to be an effective salesperson
3. various types of retail selling careers
4. a selling process that can be used effectively in most retail stores
5. various special selling and support skills needed in a retail sales position

Essential Element (5) Promotion

Comment—(5)(A)(B)(C)(D) and (E) should be considered together in planning and presenting information. Chapters involved are 5, 27, 28, 29, 30, 31, 32, and 33.

Resources for Content and Strategies

State-adopted Textbook, with support material:

(1) Samson and Little. SW-*Retail Merchandising: Consumer Goods and Services, 10th edition* Chapters which have content related to this essential element are those for which chapter outcomes are listed below.

Subelement (A) understand that advertising, display, and personal selling are the principal forms of promotion

Chapter 5, Promotion

1. promotion and how store policies affect its use
2. models that explain how communication takes place between sellers and buyers
3. what motivates consumers to make buying decisions
4. appeals merchants can use to motivate customers to buy
5. the promotional methods used by retailers
6. promotional mix and the primary purpose of promotion

Chapter 27, Selecting Goods for Promotion

1. promotional advertising and institutional advertising
2. the chapter outcomes of retail advertising
3. key considerations in retail promotion
4. seven factors affecting merchandise selected for advertising
5. the types of merchandise that should not be advertised

Subelement (B) recognize the commonly used media for advertising

Chapter 28, Advertising Media

1. defining *medium*
2. advertising media, coding, and market segmentation
3. various kinds of printed media
4. computing the milline rate in a given situation
5. the major types of electronic media
6. the relative advantages and disadvantages of radio and television advertising
7. six types of supplementary media
8. program sponsorship versus publicity

Subelement (C) understand the basic elements of newspaper advertising

Chapter 29, Preparing Advertisements

1. how advertisements are initiated in large and small stores
2. the three psychological levels of an individual's action

3. the four psychological steps brought on by good advertisements
4. the major elements of a printed or electronic advertisement
5. signature plate (logotype), layout, and dummy layout
6. creating and evaluating an effective advertising layout
7. three sources of help for advertisers

Subelement (D) understand promotional mix

Chapter 5, Promotion

5. the promotional methods used by retailers
6. promotional mix and the primary purpose of promotion

Chapter 30, Advertising Strategies

1. eight factors that influence how much a retailer might spend on advertising
2. three methods of planning an advertising budget
3. cooperative advertising
4. three possible problems of cooperative advertising
5. how advertising results may be measured

Subelement (E) understand the principles of display

Chapter 31, Retail Store Displays

1. the purpose for which window displays are designed
2. the three kinds of window display units
3. five ways in which window display units can be used
4. five purposes of interior displays
5. the two major types of interior displays
6. the six basic kinds of interior displays
7. the five basic types of display arrangements
8. what is required for a display to be judged a success

Chapter 32, Designing Displays

1. the elements of display design
2. the effect of color on customer buying decisions
3. the difference between complementary colors and adjacent colors
4. the principles of display design
5. four sources of display ideas
6. small and large store procedures in selecting merchandise for display
7. three appeals that should be considered when selecting merchandise for display

Chapter 33, Installing Displays

1. the six most important objectives of display
2. five merchandise aids that affect the visual impression given by a store
3. five steps involved in planning and setting up a display
4. display requisition, display planning calendar, display planning budget, functional prop, and decorative prop
5. ten guidelines for installing a display
6. five factors that should be considered when evaluating a completed display
7. the difference between promotional displays and institutional displays

Essential Element (6) Store Operation

Comment—(5)(A)(B)(C) and (D) should be considered together in planning and presenting information. Chapters involved are 16, 38, 40, 41, 42, 50, and 52.

Resources for Content and Strategies

State-adopted Textbook, with support material:

(1) Samson and Little. SW-*Retail Merchandising: Consumer Goods and Services, 10th edition* Chapters which have content related to this essential element are those for which chapter outcomes are listed below.

Subelement (A) understand the need for store security

Chapter 40, Store Layout and Maintenance

7. activities necessary to good store maintenance

Subelement (B) explain the importance of store policies

The index of the textbook should be checked under "policy," which has 17 entries. The three chapters that follow use the term or concept several times in either the chapter outcomes or the subheads.

Chapter 16, Personnel Policies

1. compensations plans that are used in retailing
2. five fringe benefits available to retail employees
3. two procedures used to conduct employee evaluations
4. the value of a flexible work schedule
5. job promotions versus transfers
6. effect of the National Labor Relations Act on certain employer activities
7. three ways to maintain effective communication between employees and management

Chapter 34, Duties and Characteristics of Retail Sales Personnel

6. store policies and the importance of these policies to the customers, employees, and store management

Chapter 41, Service Policies

1. the four major categories of store services
2. five selling and shopping services
3. personal shopping services
4. five different delivery policies
5. convenience services
6. two kinds of profit services
7. the purpose of a store's community service activities

Subelement (C) understand why retailers offer credit

Chapter 42, Credit and Collection Policy

1. the three basic types of retail credit plans
2. how retail stores use bank credit card plans
3. the three Cs of credit granting
4. credit-scoring procedure
5. the features of a good credit collection procedure
6. legal actions a retailer may take when a customer fails to pay a credit obligation
7. four measures for determining the effectiveness of a collection policy

Subelement (D) identify areas of retail merchandising where computer technology is used

Chapter 38, Completing the Sales Transaction

1. the activities that make up a sales transaction
2. three important sales transactions performed on sales registers
3. two functions performed by computer-assisted sales registers
4. seven of the most common errors in operating a sales register
5. procedures to follow when making change for a cash sale

Chapter 50, Retail Information Systems

5. five major applications of computers to retailing

Chapter 52, Technological Advances in Retailing

6. EFTS and three ways it can be used in retailing
7. two new areas where retailers use computer technology to make management decisions

Essential Elements Common to All ME courses

These elements are not specifically required for Retail Merchandising and may instead be covered in some other course.

Essential Element (1) Leadership concepts and skills

Comments: Additional sources of content/strategies have been identified for these because they are often taught through youth organizations, or by using specialized materials.

Subelement (A) demonstrate skills, characteristics, and responsibilities of leaders and effective group members

For useful student and teacher materials for this subelement, see National DECA, as well as the following publications from EIMC-Educational Resources:

Destination Leadership, for developing leadership skills through classrooms, schoolwide retreats in vocational settings and/or general education settings
Your Attitude Is Showing
Preparing to Succeed in Marketing

Subelement (B) demonstrate a knowledge of parliamentary procedure principles

For useful student and teacher materials for this subelement, see National DECA, as well as the following publications/CAI sets from EIMC-Educational Resources:

Parliamentary Procedure—student manual, answer book/tests, and software sets

Subelement (C) plan and conduct leadership activities

For useful student and teacher materials for this subelement, see National DECA, as well as the following publications from EIMC-Educational Resources:

Destination Leadership, for developing leadership skills through classrooms, schoolwide retreats in vocational settings and/or general education settings
Your Attitude Is Showing
Preparing to Succeed in Marketing

Subelement (D) prepare for effective citizenship and for participation in our democratic society

For useful student and teacher materials for this subelement, see National DECA, as well as the following publications from EIMC-Educational Resources:

Destination Leadership, for developing leadership skills through classrooms, schoolwide retreats in vocational settings and/or general education settings
Your Attitude Is Showing
Preparing to Succeed in Marketing

Essential Element (4) Safety and safe working conditions

Identify and apply safe working practices to all training situations

Manuals from EIMC-Educational Resources for use by co-op students often include information on safety. Safety information in the following manuals might be useful for class instruction as well as for individualized study:

Basic Visual Merchandising
Fast Food Marketing
Food Service Management
General Merchandising
Home Improvement Center Retailing
Physical Distribution
Supermarket Customer Service

Also Available from Educational Resources/EIMC/UT-Austin

Job-related Manuals for Co-op Situations

New Format Series, with Answer Book/Teacher's Guides That Include Information for Planning Co-op Training

Advertising Basics and Careers, Student's Manual (DE 820 S)
    Answer Book/Teacher's Guide (DE 820 A)
Apparel Marketing, Student's Manual (DE 419 S)
    Answer Book/Teacher's Guide (DE 419 A)
Basic Visual Merchandising, 2nd edition, Student's Manual (DE 821 S)
    Answer Book/Teacher's Guide (DE 821 A)
Food Service Management, 2nd edition, Student's Manual (DE 608 S)
    Answer Book/Teacher's Guide (DE 608 A)
General Merchandising, 2nd edition, Student's Manual (DE 819 S)
    Answer Book/Teacher's Guide (DE 819 A)
Home Improvement Center Retailing, Student's Manual (DE 316 S)
    Answer Book/Teacher's Guide (DE 316 A)
Marketing Fibers and Fabrics, Student's Manual (DE 418 S)
    Answer Book/Teacher's Guide (DE 418 A)
    (A CAI set for this title for use on Apple II is also available.)
Physical Distribution, Revised, Student's Manual (DE 818 S)
    Answer Book/Teacher's Guide (DE 818 A)
Supermarket Customer Service, Student's Manual (DE 604 S)
    Answer Book/Teacher's Guide (DE 604 A)
    Produce Photo Album available for use with this manual (DE 605 R)
Supermarket Merchandising, Student's Manual (DE 606 S)
    Answer Book/Teacher's Guide (DE 606 A)
Supermarket Special Departments, Student's Manual (DE 607 S)
    Answer Book/Teacher's Guide (DE 607 A)
Tourism and Hospitality Marketing, Student's Manual (DE 333 S)
    Answer Book/Teacher's Guide (DE 333 A)

Manuals and Answer Books in the Previous Series

For occupations in appliance marketing, automotive and accessories marketing, business and personal services, convenience store operations, financial services marketing, food marketing, food service marketing, furniture marketing, shoe sales marketing, hardware selling, home and office products marketing, industrial marketing, jewelry and gift store marketing, wholesale marketing, specialty marketing, home entertainment equipment marketing, service station marketing, and travel services marketing.

Of Special Interest

Mathematics: Essential to Marketing. The 34 assignments in the Student's Manual (DE 116 S) cover math from addition and subtraction through ratios and equations used by management to judge success of a business. A Teacher's Guide (DE 116 C) includes practice problems to be copied, answers, and other features.

COMPLIANCE STATEMENT

TITLE VI, CIVIL RIGHTS ACT OF 1964; THE MODIFIED COURT ORDER, CIVIL ACTION 5281, FEDERAL DISTRICT COURT, EASTERN DISTRICT OF TEXAS, TYLER DIVISION

Reviews of local education agencies pertaining to compliance with Title VI Civil Rights Act of 1964 and with specific requirements of the Modified Court Order, Civil Action No. 5281, Federal District Court, Eastern District of Texas, Tyler Division are conducted periodically by staff representatives of the Texas Education Agency. These reviews cover at least the following policies and practices:

(1) acceptance policies on student transfers from other school districts;

(2) operation of school bus routes or runs on a non-segregated basis;

(3) nondiscrimination in extracurricular activities and the use of school facilities;

(4) nondiscriminatory practices in the hiring, assigning, promoting, paying, demoting, reassigning, or dismissing of faculty and staff members who work with children;

(5) enrollment and assignment of students without discrimination on the basis of race, color, or national origin;

(6) nondiscriminatory practices relating to the use of a student's first language; and

(7) evidence of published procedures for hearing complaints and grievances.

In addition to conducting reviews, the Texas Education Agency staff representatives check complaints of discrimination made by a citizen or citizens residing in a school district where it is alleged discriminatory practices have occurred or are occurring.

Where a violation of Title VI of the Civil Rights Act is found, the findings are reported to the Office for Civil Rights, Department of Health, Education and Welfare.

If there is a direct violation of the Court Order in Civil Action No. 5281 that cannot be cleared through negotiation, the sanctions required by the Court Order are applied.

TITLE VII, CIVIL RIGHTS ACT OF 1964: EXECUTIVE ORDERS 11246 and 11375; TITLE IX 1973 EDUCATION AMENDMENTS: REHABILITATION ACT OF 1973 AS AMENDED; 1974 AMENDMENTS TO THE WAGE-HOUR LAW EXPANDING THE AGE DISCRIMINATION IN EMPLOYMENT ACT OF 1967; VIETNAM ERA VETERANS READJUSTMENT ASSISTANCE ACT OF 1972 AS AMENDED IN 1974.

It is the policy of the Texas Education Agency to comply fully with the nondiscrimination provisions of all federal and state laws and regulation by assuring that no person shall be excluded from consideration for recruitment, selection, appointment, training, promotion, retention, or any other personnel action, or be denied any benefits or participation in any programs of activities which it operates on the grounds of race, religion, color, national origin, sex, handicap, age, or veteran status (except where age, sex, or handicap constitute a bona fide occupational qualification necessary to proper and efficient administration). The Texas Education Agency makes positive efforts to employ and advance in employment all protected groups.